

# Contextual Intelligence for Sales Professionals

## Making Every Customer Conversation Count

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The purpose of this white paper is to introduce how Popcorn from ThreeWill and contextual intelligence from Plantronics are helping sales professionals work smarter and win more business by making every sales conversation count. We also want the reader to recognize how the solution proposed in this paper helps sales management gain greater ROI in their CRM and Social application investments.

# Contextual Intelligence for Sales Professionals

Making Every Customer Conversation  
Count

## Introduction

This paper introduces some of the challenges that sales professionals face with leveraging today's technology and tools. We will cover recent technology advances in context-aware computing and how the most customer-relevant data can be delivered at just the right time to sales professionals through a product called Popcorn. As you read this white paper, note how this solution can contribute to the following aspects of ROI: Time to Find Information, Better Sales Analytics, Missed Opportunity, and Better Collaboration Around Opportunities.

If you are interested in improving these metrics with your sales organization, you should read on. And as you read on, you will see how contextual intelligence will have an impact on sales productivity and better use of your company's intellectual property.

## Addressing ROI

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As you read this white paper, note how this solution can contribute to the following aspects of ROI:

### Time to Find Information

Zero effort is spent on retrieving relevant customer information as sales professionals make and receive calls.

### Better Sales Analytics

Sales call information can be easily kept up to date because data input screens are presented to the sales professional contextually to the phone call.

### Missed Opportunity

Opportunities will not be missed due to lack of current customer information during the call.

### Better Collaboration Around Opportunities

Pull in other people in your organization to leverage the intellectual and social capital of your company when working on progressing and closing deals.

## *The challenge of succeeding in a hyper-competitive world*

Sales professionals today are challenged to deliver top performance results in highly competitive environments. To achieve these results, organizations are investing millions of dollars in new infrastructures, applications, and mobile devices aimed at improving process efficiencies, sales productivity, and helping the sales person harness the collective wisdom of the company. In the world today, Automatic Call Distributors (ACD), CRM, Social and Market Intelligence, Conferencing and Mobile have been game changing improvements to the efficiency of sales professionals and sales processes. ACD's help route calls efficiently to the right inside sales groups; CRM, Social, and Market Intelligence apps provide vast amounts of customer information that can be shared and leveraged to organize around maintaining and improving customer relationships; Conferencing applications enable the sales person to meet with customers without incurring the costly travel time required to meet face to face; and the mobile phone enables the sales professional to stay more connected with customers and internal resources throughout the day regardless of their location.

### *Available but not easily accessible*

Yet with a plethora of knowledge and communications tools, today's sales professional faces the daunting challenge of wading through vast amounts of customer related information across multiple applications. With organizations constantly challenging their workforce to do more with less, sales professionals often don't take advantage of customer data due to the effort required in retrieving it. With the pressure to maximize customer-facing time, it is a burden having to stay abreast of ever-changing customer information locked away in enterprise systems. Worse, not only do they need fast and easy access to this information, they are often required to capture new data into their enterprise systems. This data helps sales management, but is frequently seen as a distraction and too time consuming to the sales professional who is rightly focused on meeting their individual performance targets.

How can next generation applications better serve the sales person without the burden of the time consuming work required to dig through enterprise apps for the information that can help them? Context-aware applications, like Popcorn, are the next generation of apps designed with one purpose in mind – to deliver the customer-relevant information to the sales professional at exactly the right time, without the need to think, search, or take any action. This creates pure value for the sales professional who now has a tool that is constantly monitoring and working for them across all the disparate applications they need to tap into in order to succeed.

## *A new era of contextual computing*

More than any other enterprise worker, the sales professional needs to maximize the use of their time actually interacting with customers. And each interaction needs to be productive which requires selling skills and access to the most customer relevant information to enrich that conversation. For many sales professionals, the mobile phone has become their single most critical business tool allowing the customer to reach them on one number regardless of their location. This allows them to be productive while in the car, sitting at their desk, or moving about. In fact, according to Gartner, more than half of all telephone calls while in the office are conducted over the mobile phone. For sales professionals that number is likely even higher.

Not only are we in the era of mobile phones, but it is an era of BYOD (bring your own device). The mobile phone has the least amount of standardization within enterprises, and in many cases, the user can control which device they choose. Application solutions must take into consideration this challenge and embrace how these devices can be best leveraged to create value for the user.

## *Harnessing intellectual and social capital*

With tools like the mobile phone, web conferencing, CRM, and Social Business applications already purchased and adopted, the key question is - how can these tools be put to far better use in support of the sales professional? Unified communications is about unifying all of the knowledge worker's communications tools into a seamless experience. With contextual intelligence, Plantronics is taking business to the next level. By combining communications tools with information tools, a more seamless workflow is created that helps the sales professional make the most of every customer conversation. What this simply means is that applications now know what the sales professional needs in any given customer interaction moment, and proactively brings that information to the sales person without them having to think or do anything to make that happen.

## *Making the Conversation Count*



From a practical standpoint, ThreeWill is looking to improve the basic call workflow by addressing these questions:

1. How can we connect salespeople with key contextual information during calls with little to no effort?
2. How can we improve the conversation by informing the salesperson while on the call?
3. How can we improve follow up with next steps to be taken after the call and make logging calls easy (and almost fun)?

## When a few seconds must count

When a telephone call is being initiated or received by the sales professional, there is a scant few seconds for all the customer relevant information to become known to the sales person. Since this information is often contained across multiple applications such as CRM, Social, and Market Intelligence, it's simply not possible for the sales person to remain in-the-know before every customer interaction, nor begin to search across those applications during a call. Now imagine a scenario where all of the pertinent enterprise applications are triggered into action whenever a customer interaction is occurring. And before the sales person is actually speaking with the customer, he/she is instantly armed with the most up-to-date customer-relevant information, making each and every conversation impactful. For example, before you answer a call, you might want to see the incoming caller's name, a picture and their title (see the above Figure 1 for an example view of this incoming call).

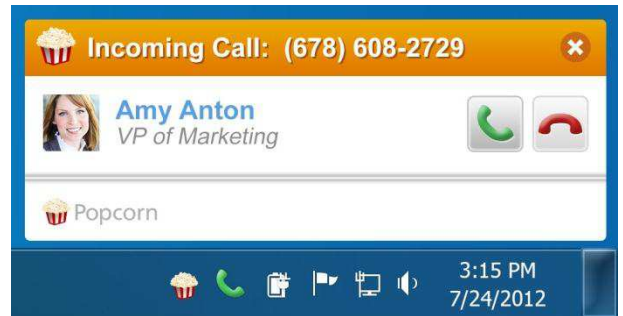


Figure 1 – Popcorn Screen (Incoming Call)

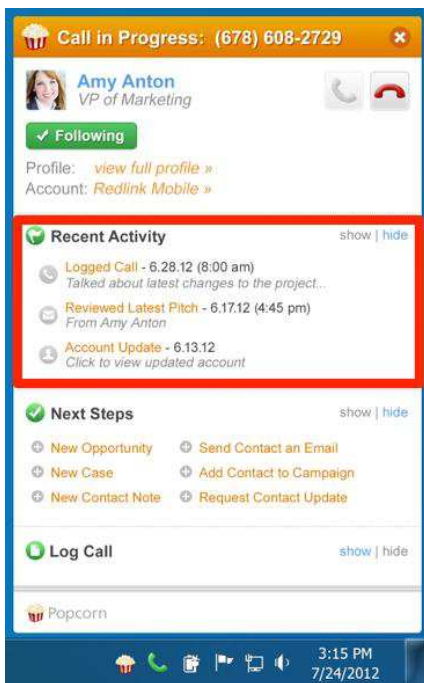


Figure 2 – Popcorn Screen (Call in Progress)

During the conversation the most recent interactions are at the sales professional's fingertips and are one click away when more detail is desired. Instead of discovering the details of a colleague's key interaction at the next sales meeting or the next time they decide to navigate the CRM database, they are presented a list of these interactions without having to lift a finger. For example, in Figure 2 you can see the most recent CRM activity and can click through to view the details if this is pertinent to the conversation. This would be done simply by answering the phone call and being in front of their laptop where this enterprise intellectual and social capital is presented to the sales professional when they need it most.

## After the conversation

But that is just the start. Now that the customer conversation has been made more impactful, wrapping up the call often means the sales person is required to enter data about the customer interaction. While serving the needs of management, and possibly the broader organization, this places a big burden on the sales person who must now wade through many screens to just add one recent note to the customer record. In fact, this is such a daunting task to the sales person entering the information, that many times this step is skipped altogether.

Now imagine if all the sales data entry steps went away and the only step required was typing a quick note about the conversation while the application figured out where to store this in your CRM system. By saving the sales person multiple time-consuming steps, the CRM system gets updated, and the sales person barely skips a beat moving forward in their day to the next customer conversation.

## Where is the magic?

There is magic in bringing the synchronous world of conversations that occur over tools such as mobile phones and PC softphones (Skype, MS Lync, IBM Sametime, etc) with the world of asynchronous PC/Cloud based tools (email, Social, CRM) together in a way that triggers those applications into action with no effort on the part of the sales professional. For sales professionals, these two sets of tools live in entirely separate worlds where enterprise apps are unaware of what is happening with live customer interactions. By leveraging contextual intelligence from Plantronics, ThreeWill is bringing a context-driven dashboard to the sales scene with impressive results.

## How does this magic work?

These next-generation contextual enterprise applications are provided through the intersection of Plantronics as the Context Broker and ThreeWill as the Enterprise Data Broker. Plantronics has innovated at the nexus of mobile, context, and cloud, to deliver new context broker services which monitor the sales person's physical and communications worlds. Through the Spokes context broker, Spokes compatible applications receive real-time updates on the ever-changing day in the life of the sales professional. ThreeWill has been focused on enterprise social connectors with key enterprise systems like SharePoint, Jive, Salesforce and Polycom to bring the right enterprise data to the right individual in the enterprise. With the Plantronics contextual broker, now ThreeWill can not only

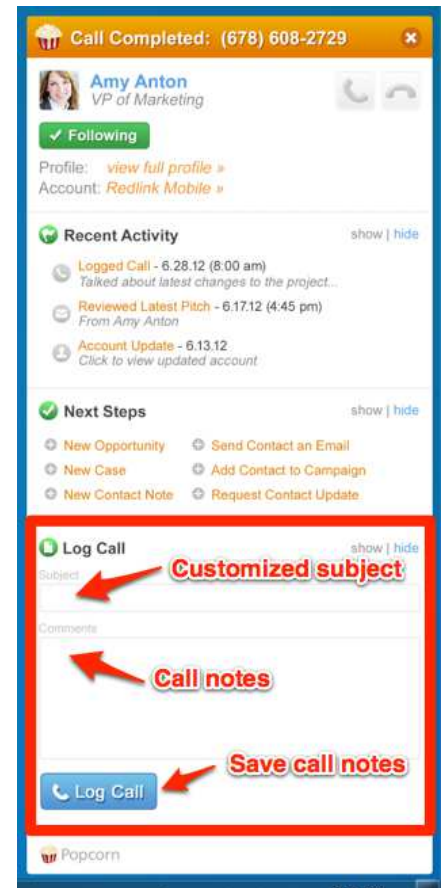


Figure 3 - Popcorn Screen (End of Call)

connect to the enterprise systems, but connect and pull and push data when it counts – at the moment of truth when the conversation is occurring.

## Intercepting the context of the call

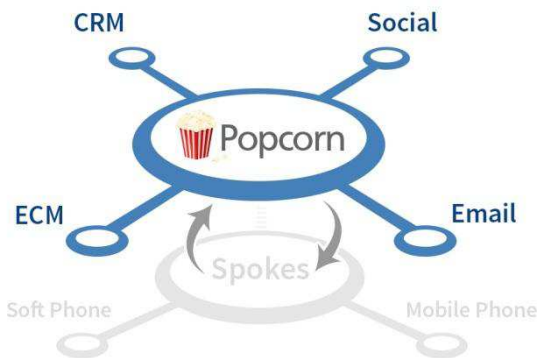
The Spokes Platform enables a unified eventing model that abstracts applications from the hardware and telephony protocols (mobile and soft phones today and wired phones in the future). By alerting applications to a user's:

- a) **physical states** such as when a headset is worn or removed or when the sales person is walking away or back to their PC and
- b) **communication states** such as when that person is on a call, and knowing whom is on the other side of the phone call



Plantronics Spokes services make enterprise applications smarter, more user-aware.

## Connecting the enterprise data with the sales professional



The Popcorn Platform bridges the user context provided by the Spokes Platform to the enterprise content world. This enterprise content can reside in any application such as CRM, Social, Email or ECM data that is pertinent to the sales professional. With the context of the incoming or outgoing caller ID, Popcorn Connectors can filter enterprise data based on what is pertinent to the conversation. Popcorn Connectors can retrieve the information needed from enterprise systems and display it real-time during the phone call. Not only can it

display this information, but it gives one-click access to even more detailed information. Finally, Popcorn can push key elements of data back into the enterprise systems (i.e. a call log entry into CRM system).

## *Lowering the friction between sales professionals and customer data*

Hopefully, this white paper has opened your eyes to the efficiencies you gain with leveraging contextual intelligence with your sales force. The key tenant of Popcorn is to make it quick and easy for your sales professionals to consume and update key enterprise data that enables success with their customer interactions. To have a dramatic impact to your company's bottom line, you need to increase productivity and effectiveness where it counts the most, the sales professional. Valuable enterprise data exists today, but it needs to be brought to the awareness of the sales professional. Popcorn pushes to the sales professional the enterprise data that is contextual to a conversation. With the power of Spokes context broker and Popcorn as your broker of enterprise data, you can serve data to the sales professional and make every customer conversation count!

## *Improving Effectiveness and Productivity with Popcorn*



We believe Popcorn will be transformative to your organization. To recap this white paper...

### **Key user benefits include:**

- Improved conversations because you get the total picture of the caller
- No surprises b/c you know about recent activity with caller (support cases and opportunities)
- Efficiency through common actions are at your fingertips with context (like logging calls)

### **Key company benefits include:**

- More value out of information typically "locked-up" in systems
- Better customer satisfaction because a well-informed sales force can serve customers better
- Information in systems is more up-to-date because interactions are being logged and it's easy to update information