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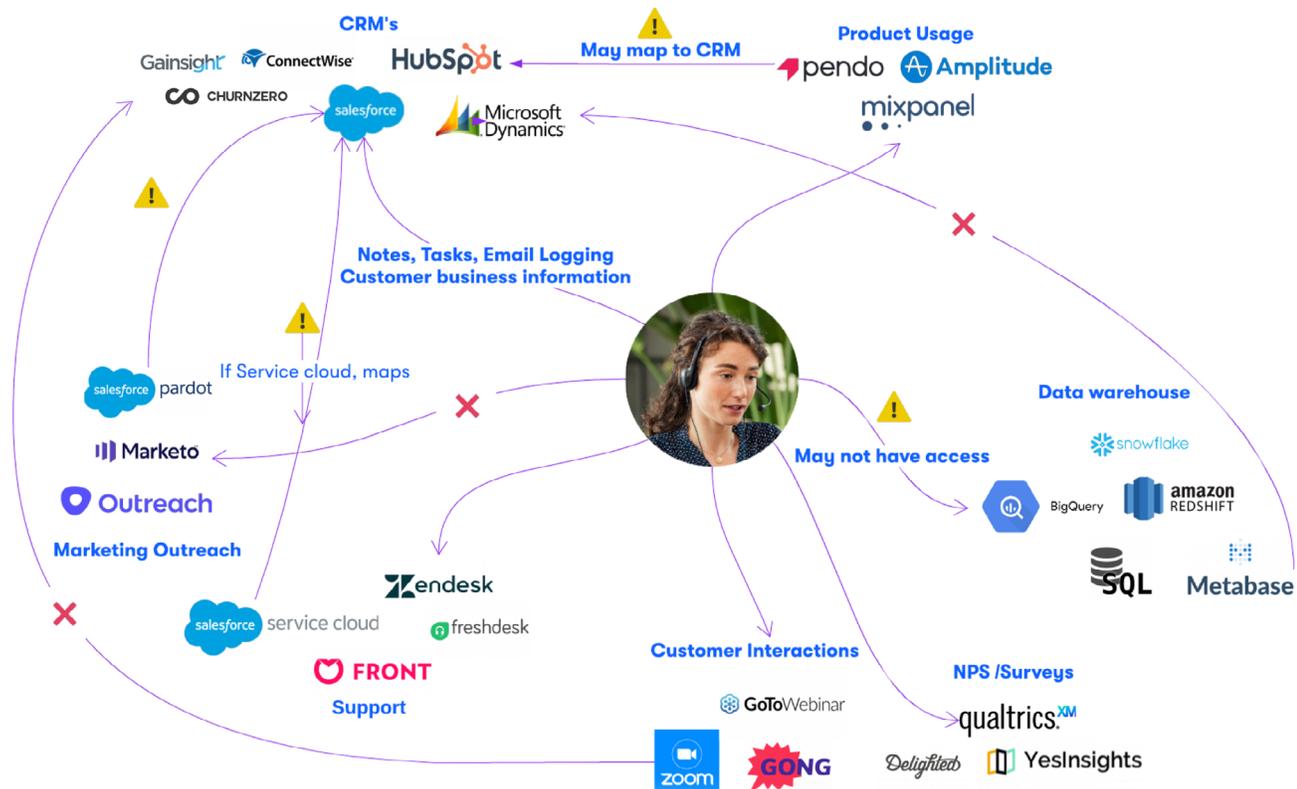
Turning Disjointed Customer Data Into Winning Conversations



How accurate is your data?

There's both good and bad news when it comes to data today.

The good news is that today's technology gives us access to unprecedented amounts of customer data. The bad news is that we're not all utilizing that data to deliver the best possible outcomes for our companies. Many businesses use customer data incorrectly. Others have incomplete data, prohibiting them from taking the necessary actions that would actually change customer conversations.



The Challenge of Data

Collecting and utilizing the right data can be challenging on several levels:

- How do you aggregate the right customer data?
- How do you get the insights that drive better customer conversations?
- Does the data tell you about the strength and the health of your customer relationships?
- As a Customer Success professional, can you do something with the data to change the trajectory of your customer relationships?
- How can you use the data to create excellent customer experiences so that when renewal time comes around, you are in the right spot to resign them?

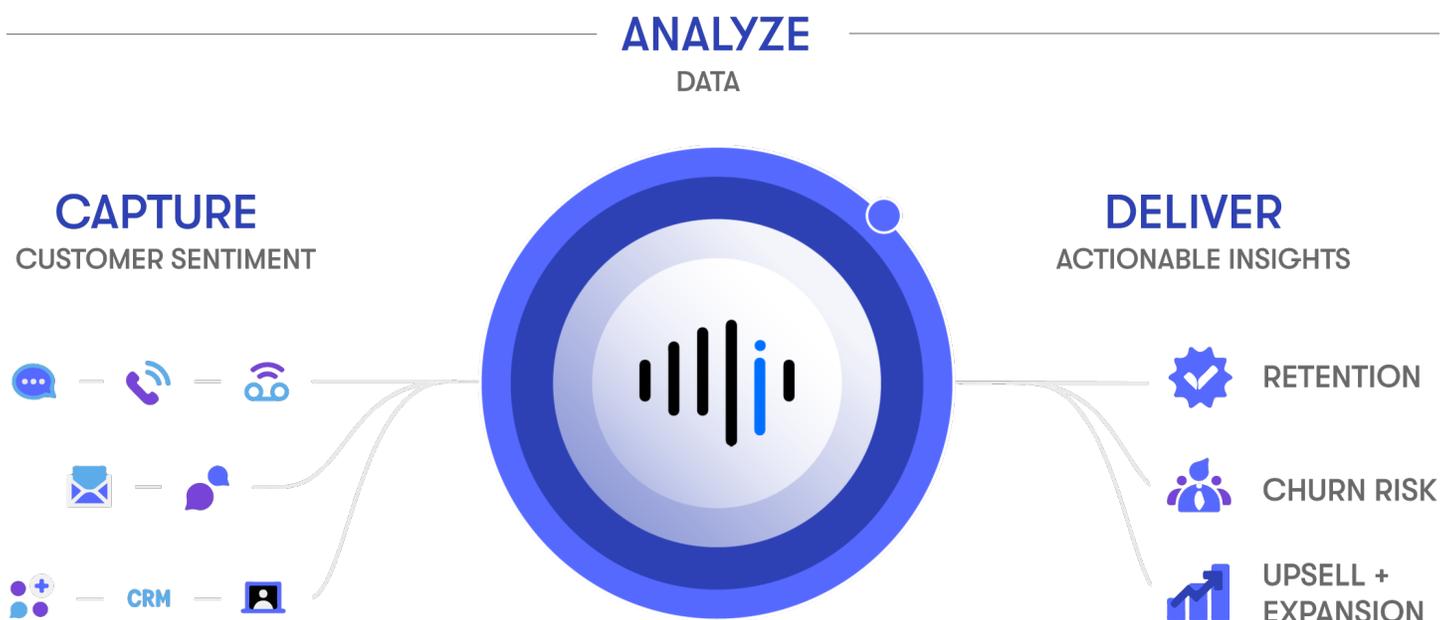
Creating a Customer-Centric World

While properly using the data is challenging, it can be harnessed to create a customer-centric world. At involve.ai, we believe that the new way of doing business is ultimately about understanding your customers and the market and using data to make sure you're delivering a product/service that is the most relevant and helpful to your customers. It's about taking a data-first approach to help your customers—and you—innovate.

We've come a long way from the 1970s when software sales were transactional—customers would buy it, install it, and that was it. The customer didn't expect the company they purchased from to do anything else to help them.

But now we're at a place that's more customer-centric. A place where customers expect more from us. So, how do we personalize their experiences? How can we create exceptional value for them beyond what the competition can do? The answer? Leveraging customer intelligence.

In the new world, it's imperative to focus on what you can do with the data you collect. To use it to bring visibility—an accurate 360-degree view of your customer. The customer intelligence you collect is being pulled, not from just one system, but from all the data sources you have on your customer. That kind of visibility and degree of insight it offers allows you to be proactive. To identify risks, get ahead of any churn, and understand the signals for growth throughout the customer's lifecycle.



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Be a Hero

All businesses want their customers to think of them as heroes. One way to accomplish that is to offer solutions to your customers before they know they have a need—to be prescriptive.

What does that really mean? Being prescriptive is about understanding your own needs and those of your customers and guiding them along the journey by explaining how to maximize your product or service based on what they're trying to accomplish. Utilizing customer intelligence enables you to anticipate their needs and be proactive and prescriptive about helping them improve their outcomes.

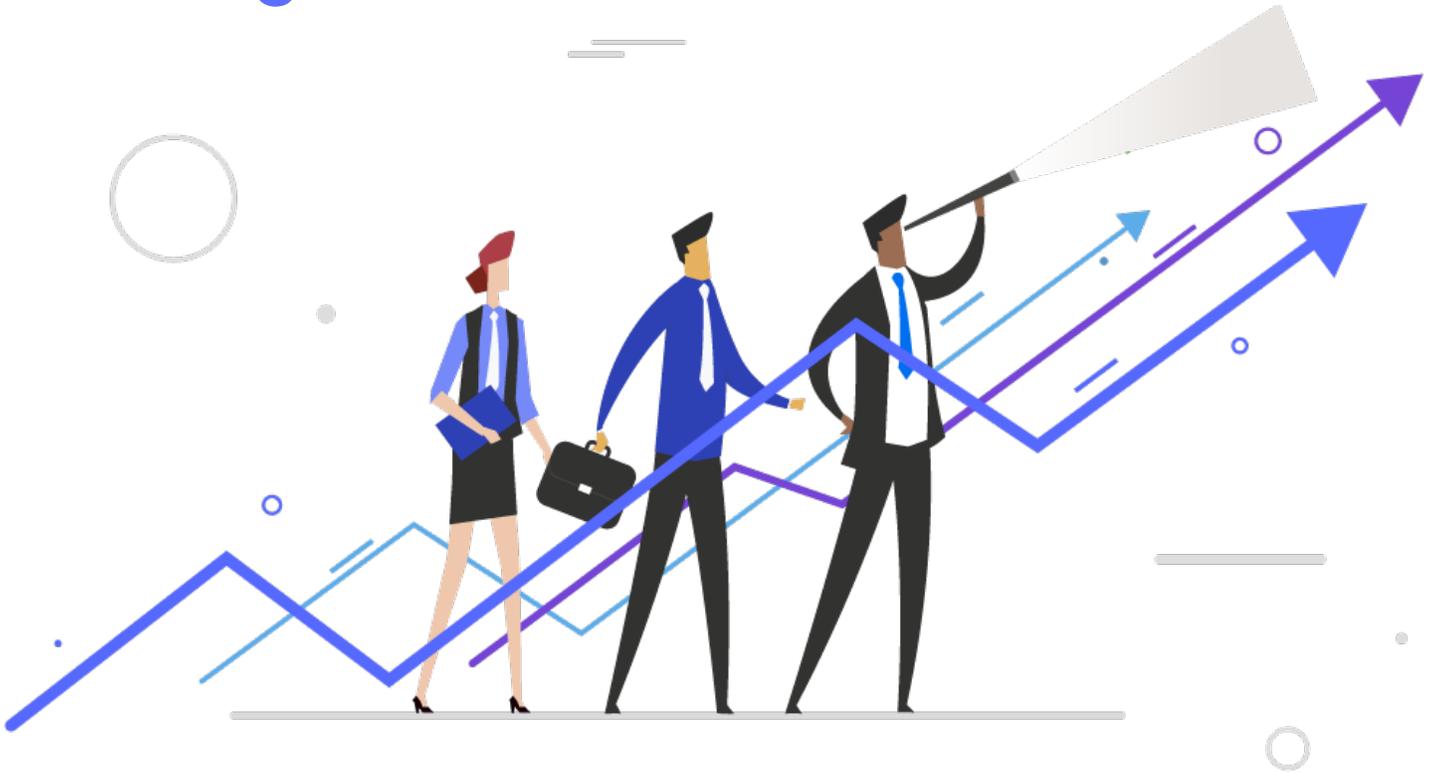


Collaboration

Most companies have several teams of people working together to do what's right for the customers. But so many inputs can, too often, feel disjointed to that customer. Customer intelligence allows all team members to take the right action at the right time with the right stakeholders and keep everyone on the team informed. This creates scale, offering customers an even better experience.

Collaboration is not just about the team but also about marrying their efforts. You can't be proactive or prescribe the right approach unless you have visibility into how the customer gets and uses your product. And that starts with visibility.

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Visibility

And that's one of the sweet spots here at involve.ai—that regardless of where the data is, we pull it all together and map it to create that visibility. But we see many of our customers coming in with siloed data—they haven't yet used a data lake or a warehouse. We consider this an opportunity to show them how to start leveraging technology, be more strategic, and be heroes to their customers.

But what's next? Once you've moved your data out of silos, unified it, and have a holistic picture of your customer relationships, what do you do with it? What changes in the customer conversation?

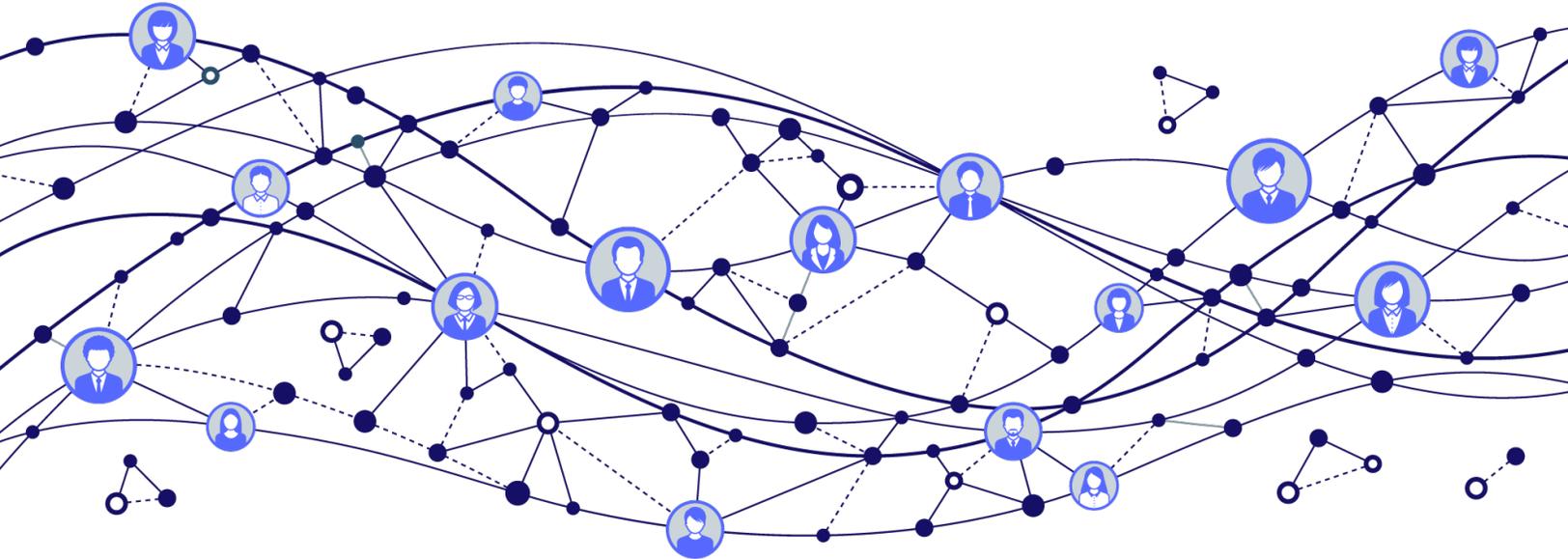
Typically, after the onboarding period starts, there's a long middle of the relationship where the data gets collected. Then, what often happens, is that the commercial conversations, the renewal, the upsell, etc., often wait until the very end of the relationship.

But if your conversations focus solely on that day-to-day and not on how to take the data and transform it into something of value your customers can use, that only reinforces a messaging void that others can fill. Instead, to ensure you have the right conversations at the right time, you need to use the right data. And realize that it is only as good as your team's ability to have ongoing customer conversations.

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Are You Sharing Best Practices?

A common mistake made by many companies is remaining siloed. Best practices are simply not shared. A CSM may have the best view of the customer, but that information needs to be shared with sales. Sharing the specific messaging that resonated with particular customers can not only improve sales, but it's also helpful for the products or engineering staff to know what's resonating.



Weeding Out Data

While there's so much data you could collect that you think is relevant, part of the challenge is weeding out what actually impacts your customer versus the data you want to track internally but doesn't impact their behaviors or actions.

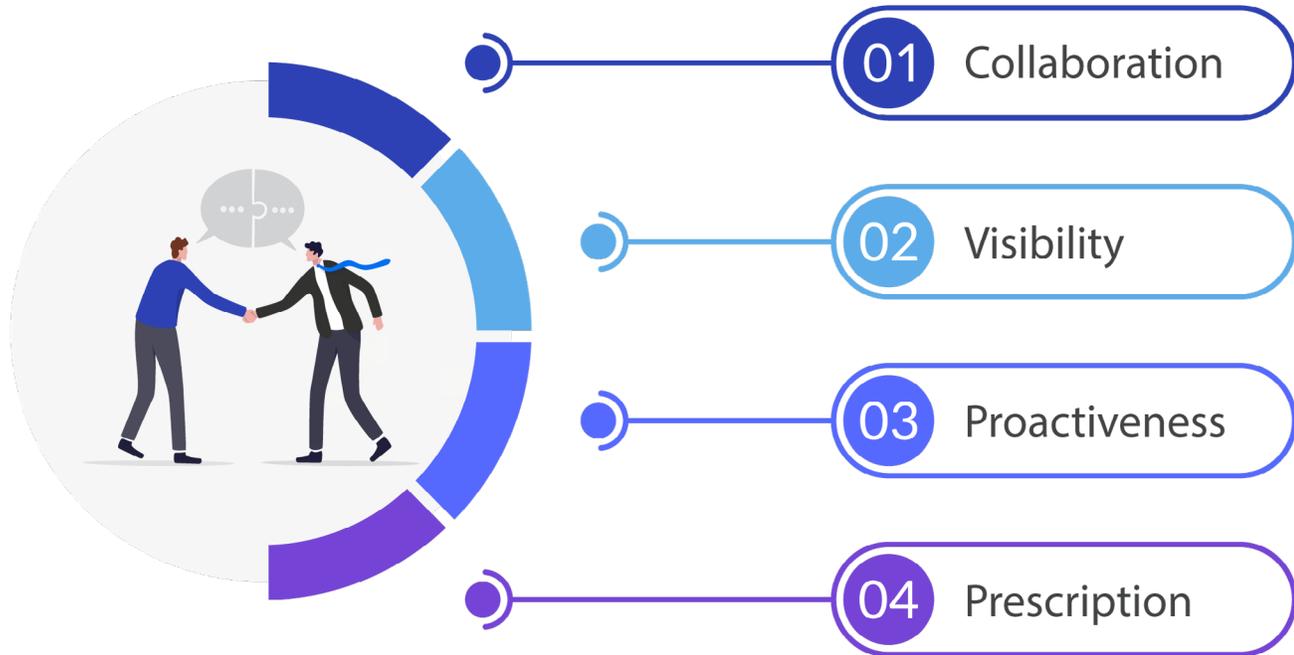
The machine learning and artificial intelligence capabilities we provide go beyond what data scientists can do with the data because they turn insights and trends into recommended action. It would save Customer Success professionals so much time if they knew in advance what type of conversations they need to have and when they need to have them.

Capturing this customer intelligence and feeding it back to your team and your customers allow you to make recommendations about what the data reveals. Since it's data-driven, it's hard to argue with. These are the things CEOs should be interested in since leveraging the data helps them expand their existing customer base, impact growth and revenue, and transform their organization.

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Getting Started

Remember there are four parts to creating winning conversations



At the end of the day, the data you collect doesn't give you a scalable solution if you do it manually. So no matter where you are on the evolution of customer intelligence, it's never too early or too late to get started and think about unifying your data to be able to tell a data-driven story to your customers.

The above information is derived from a webinar presented by Doug Hutton, who leads the products team at Corporate Visions, and Mary Poppins, the chief strategy and customer officer at [involve.ai](https://www.involve.ai). You can see [more of their conversation here](#).

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