

# What Is Customer Intelligence?

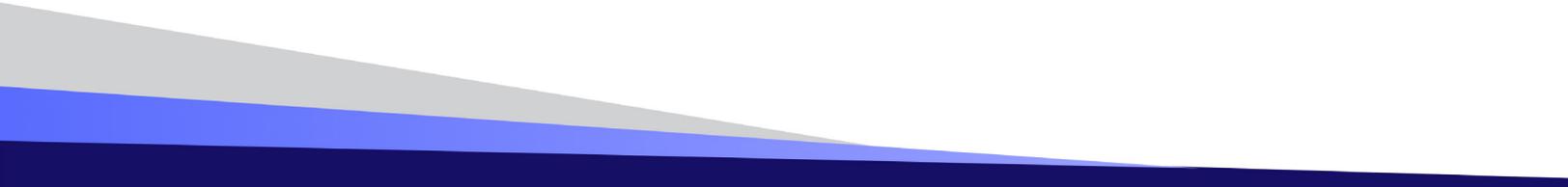
## White Paper



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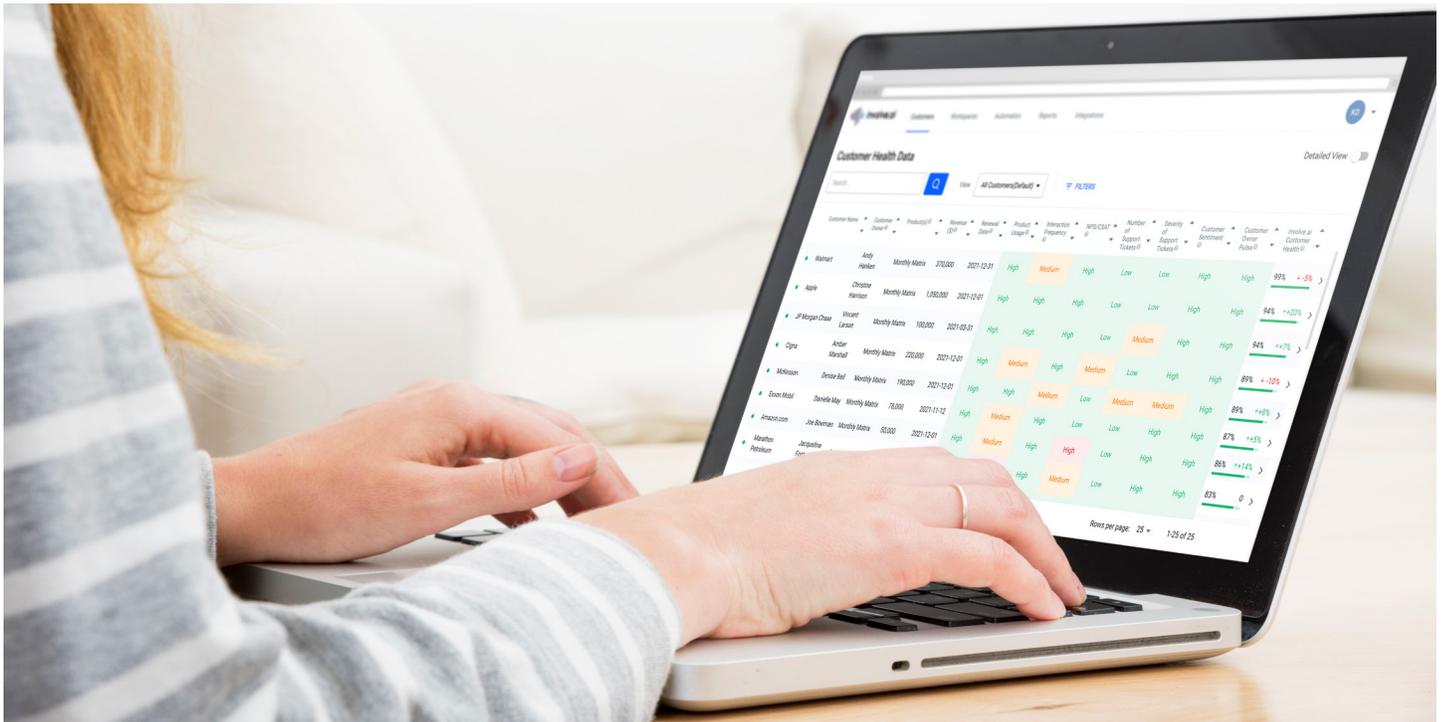
# What is Customer Intelligence?

## Introduction

This whitepaper seeks to thoroughly explain what customer intelligence is and why it matters for modern businesses.



involve.ai is establishing and leading the customer intelligence movement. We are passionate about people and helping businesses serve every person in their ecosystem better. By leveraging the latest in emerging technologies, paired with a meticulous eye for detail and honed instincts on what works in customer success (CS), involve.ai is uniquely positioned to help companies design and ensure better customer experiences. In many companies, customer intelligence (CI) is an untapped wealth of resources that hold the key to not just surviving, but thriving. Here is what you need to know.



## Customer Intelligence 101

Customer intelligence is a business intelligence function and a modern growth engine. In customer intelligence, researchers gather and analyze every facet of customer information, from usage data to transactions to behaviors. Analyzing this data provides unparalleled insights into the state of customer experiences and relationships. Customer intelligence is becoming a critical element for business success because it equips teams with data-driven actions to proactively reduce churn, improve customer experience, and help customer success.

# Definition Bank:

**There are many terms used around the discussion of customer intelligence, which are defined here.**

**Customer Intelligence (CI)** – Customer intelligence is the process of collecting and interpreting customer information with the goal of understanding and improving customer experiences.

**Customer Success (CS)** – Customer success is the department that runs operations around customer intelligence. CS teams often work alongside technical teams, identify growth opportunities, provide training and knowledge, drive adoption, and manage the customer life cycle. Sometimes, tasks overlap or coordinate with account management.

**Customer Experience (CX)** – Customer experience is the entire scope of customer engagement through the customer journey. CX is an important metric and one which showcases the outcome of effective CI.

**Customer Analytics** – Customer analytics is a process that takes customer behavior data and interprets it to inform strategic decision making.

**Customer Data** – Customer data is derived from numerous sources, including call centers, websites, mobile apps, customer interaction history, customer demographics, social media, transactional data, and more.

**Churn** – Churn refers to customers that stop buying products or services. Churn rate is the rate of attrition or churn, represented by the percentage of customers that are lost in a given time frame.

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Related Reading: [4 Proven Strategies to Reduce Churn](#)

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**Net Revenue Retention** – Net revenue retention is a percentage that represents the amount of recurring revenue retained, and expanded, from existing customers in a given time frame. It is often calculated monthly or annually as a sum total among all customers.

These and many more components of CI are powered by industry standard tools.

# The Tools:



**Customer Relationship Management (CRM)** — A CRM is a software system that manages customer relationships by storing customer information, including transactions and touchpoints. It is often used both by marketing and sales departments.

**CRM Examples:** HubSpot, Microsoft Dynamics, Freshworks, Salesforce, Pipedrive, and Zoho.

Some companies create their own CRMs.

**Note:** In CI, CRM tools power a SAS, or Statistical Analysis System. CRM data provides important information for SAS programs that store, retrieve, modify, and compute data values, as well as performing complex statistical analyses and generating reports.



**Focus Groups** — Focus groups are one of the most common ways customer intelligence data has been gathered since the discipline began. To acquire customer insights, focus groups invite specific customers to provide feedback in the format of a moderated group discussion. Participants are guided through the discussion, which informs qualitative research to explore customer mindsets, opinions, beliefs, and predict behavior.

**Focus Group Examples:** Mini focus group, remote focus group, dual moderator focus group, single focus group, and dueling moderator focus group.

**Note:** Similar to focus groups, CI teams may also conduct one-on-one interviews with customers.



**Questionnaires and Surveys** — Questionnaires and surveys are important tools for CI, as they reach individual customers and can yield insights in the form of answers to specific questions and on specific topics.

**Questionnaire and Survey Examples:** Customer satisfaction surveys, pulse surveys, product questionnaires, “how did we do” surveys, interaction follow-up questionnaires or surveys, NPS surveys, and form surveys.

# The Tools:



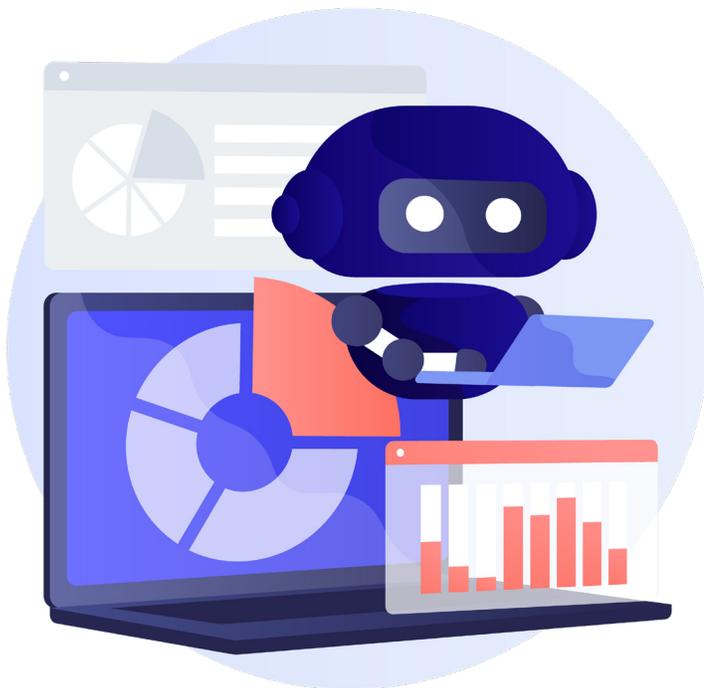
**Market Research** – Market research and analysis in customer intelligence also includes activities around competitive intelligence. Both competitors and products themselves can be researched to better understand the competitive landscape and market dynamics.

**Market Research Examples:** Customer observation, geographical market analysis, competitive intelligence research, exploratory research, causal research, and descriptive research.

**Note:** Some CI professionals will consider focus groups, questionnaires, and surveys as part of the broader category of “market research.”



**Data Management Platform** – Managing customer data and market research data is best done through a data management platform. This ensures data is standardized for comparison or contrast, includes all relevant points, and is accessible across interoperable teams or to all stakeholders. It also keeps data clean and organized, rendering it useful for real time insights and decision-making.



**Part of the value of involve.ai is exceedingly effective data management.**

Watch a [LIVE DEMO](#) of the involve.ai software here.

# The Tools:



**Customer Data Platform (CDP)** – Data management platforms may facilitate the data across an entire company, which includes vast types and quantities. A customer data platform more specifically manages customer data, including the following:

**PII** – Personal Identifiable Information, which includes any information that either directly or indirectly conveys an individual’s identity.

**Behavioral Data** – Behavioral data can be derived from chatbots, support desks, email, wearables, smart TVs, the web, and mobile applications. It reports on tracked behavior patterns and interactions.

**Surveys** – The results of any survey a customer or user has participated in should be included in the customer data platform.

**Satisfaction** – A rating of how satisfied a customer is provides essential insight for churn predictions, and is an important aggregate metric for CI teams when assessing an organization’s overall health.

**NPS tools** – Net Promoter Score is a traditional marketing measurement to gauge whether a satisfied customer has reached the optimal level of loyalty wherein they are willing to recommend or promote a company or product. NPS feedback data should be stored in the customer data platform.

# The Tactics:

Customer intelligence is a discipline that requires rigorous methodologies and ongoing analysis. It is neither simple nor short-term. Effective CI includes three tactics, which should be refined over time:



## Audience Segmentation Analyses

A goal of customer intelligence is to create a customer experience where every individual feels they are receiving special treatment. This is only possible through a carefully architected customer journey, which is an outcome of audience segmentation.

Audience segmentation is the practice of segmenting an audience based on defined criteria.

This allows marketing and sales teams to tailor messaging, addressing the unique value drivers of each segment.

Ongoing analysis is required, as the strategic subgroups within a target audience can evolve or change over time.



# The Tactics:

## Customer Journey Mapping

Customer journey mapping is a vital exercise in which CI teams create a visual map of the customer journey. This is sometimes based on a marketing or sales funnel, and often features four to five stages, such as consideration, exploration, comparing, purchasing, loyalty. Within each of these, customer actions, touchpoints, experiences, KPIs, involved parties, and business goals can be associated and tracked.



## Benchmarking

In every CI exercise, whether it is structural or operational, benchmarking must be done.

Benchmarking can include things like KPIs, and may be time or action-based. It is important that all stakeholders have visibility not just into CI process, but progress.

A platform that features dashboards will aggregate and visually present broad data sets in a way that gives immediate understanding of CI efforts, including which benchmarks have been achieved and which have been missed or are delayed.

# The Why:

## Why does customer intelligence matter?

It should be apparent that customer intelligence is the only way to make essential business functions visible. Decisions are not made in a vacuum, and data is not held in a blackbox. Customer intelligence unlocks essential information, making it clear how teams need to react or adapt.

But customer intelligence is not a one-and-done endeavor, and its impact is relevant in the short-term, mid-term, and long-term.

SHORT-TERM	MID-TERM	LONG-TERM	BONUS: THE INDEFINITE FUTURE
Customer intelligence uses in-depth data to score customers, exceeding the mere NPS score in value for predicting churn risk & other problems, which Customer Success teams can then address before they escalate.	Customer intelligence gives the customer success team, as well as other stakeholders, the ability to regain control in managing customer relationships.	Customer intelligence, and shaping the customer journey based on this intelligence, forms long-term customer perceptions. Over time, the net impact is what a brand becomes known for in the marketplace, which impacts its own longevity.	involve.ai is interested in all of the above, understanding that masterful CI unlocks endless possibilities for delighting customers. We are interested in moving the CI function from reactive to proactive to predictive.  Read on to learn how.

# The Why:

## The Power of Serving People Well

*"A satisfied customer is the best business strategy of all."*

Michael LeBeouf

Customer intelligence is a highly technical field based on research and data. And yet, the overwhelming motivator for engaging in it is people-centered. The demand for personalized experiences has never been higher:



**72%** of consumers will only respond to personalized emails

**Source:**

[Smarter HQ Whitepaper](#)



**71%** of consumers expect companies to deliver personalized interactions

**Source:**

[Mckinsey's Next in Personalization 2021 Report](#)



and **76%** get frustrated if that does not happen

**Source:**

[Mckinsey's Next in Personalization 2021 Report](#)

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Personalization is made possible by tracking and remembering interactions. In businesses of almost any size, this requires automation. The outcome is that customers feel understood and valued, which has a direct impact on revenue:



Fast-growing companies drive **40%** more revenue from personalization than slower-growing counterparts.

**Source:** [Mckinsey's Next in Personalization 2021 Report](#)

Customer intelligence can turn information into profit by decreasing competition and increasing customer loyalty. The more a business knows about its current customers, the more it can attract ideal customers, which builds predictable growth into its future.

# The Metrics of Success in CI:

**How can you be sure that CI is working? This ties into the measurable success, information which can be gleaned from tracked KPIs and benchmarking.**

Many of the following success metrics have been mentioned so far, and are collectively important to defining a “win” in CI management:

- ✓ Customer churn rate
- ✓ Monthly recurring revenue
- ✓ Customer lifetime value
- ✓ Customer health score
- ✓ Net promoter score
- ✓ Qualitative customer feedback
- ✓ First contact resolution rate
- ✓ Customer retention cost
- ✓ Customer effort score
- ✓ Customer satisfaction score
- ✓ Product usage rate
- ✓ Active users
- ✓ Conversion rate
- ✓ Renewal rate

You should have a firm grasp of the basics of CI. Now let’s look at where it all began.

# The History of Customer Intelligence:

As a facet of business intelligence, customer intelligence has been exercised in some form or fashion since industrialization. Business leaders have always recognized the importance of understanding customer behavior, identifying trends, and attempting to course-correct or refine processes to secure customer loyalty.

1995-2000

## Business Models and the Advent of Customer-Centric Outlooks

In modern times, customer intelligence has been most closely associated with the customer success function. Customer success for customer relationship management has its most noteworthy formation in the mid-1990s. Facing a high failure rate in the average enterprise CRM system, a company called Vantive was launched, and a leader in that company called Marie Alexander began a Customer Success department. The idea was quickly adopted in other companies, and steadily evolved as an important albeit minor function loosely associated with sales and marketing.

2000-2005

## Customer Relationship Management Software Becomes Mainstream

Between 2000 and 2005, it was really the race of the CRM. As software systems for managing customer relationships became more refined, access to new data about customer behavior increased. This changed the nature of what CI teams could see, and how fast they could see it. CS as a function became firmly established in most companies, and feedback loops like questionnaires, surveys, forms, focus groups, and more provided a steady stream of insight.

2005-2010

## Marketing Automation Changes the Game in Sales and Marketing

As technology improved, so did the interoperability possibilities between departments. This included new capacities for how CS could inform or interact with data from other areas of a company, and brought CS from its corner or expertise into a more mainstream role.

By 2005, Salesforce had built the largest CS department in SaaS, and all major companies were looking to CS experts to explain churn, shape customer experiences, and create new strategies for acquisition and retention.

# The History of Customer Intelligence:

2010-2022

## **AI and Big Data Transform Knowledge Banks and Unlock Predictive Abilities in CI**

Fast forward, the last two decades of progress have been immense. Technology has dramatically changed the way business has been done in the last 20 years, with most enterprise companies now heavily reliant on immense tech stacks and amassing their own sets of Big Data through algorithms and more. Data scientists are now regularly employed in many departments.

What we can know, and the data we collect, has grown substantially. That said, not all companies are making the best use of CI data, which is why involve.ai's market disruption has been so immense. For the first time ever, it's possible to extract the most and best information out of huge data sets, and form tactical plans that win.

# Customer Intelligence's Interdepartmental Impact:

Customer intelligence has been covertly or overtly present across many departments since its advent. Some of the most noteworthy areas of impact in the last five years have been in marketing, finance, retail, and eCommerce.

- ✓ **CI in Marketing** — Marketing has welcomed CI for decades, because the [CRM is a core tool in the discipline](#), and the importance of customer experiences directly impacts marketing campaigns. High quality customer data makes it possible to deliver the most relevant, timely messages that yield the best results. CS also has plenty of data on what customers don't want, which is equally important when crafting content that feels personal, and delivering it to as many people as possible.
- ✓ **CI in Finance** — The finance department connects every expenditure to return, and so the insights gleaned by customer intelligence are immensely valuable to finance leaders. Essentially, this knowledge leads to revenue growth. As a result, there has been a marked rise in the prevalence of CI data used to make financial decisions and even [shape financial services](#).
- ✓ **CI in Retail** — Transactional data is one of the primary collections for the CI function, which sheds light on customers' retail experiences. CI allows businesses to understand customer experience at every step of the journey from chatbox experience to shopping cart abandonment. This knowledge helps top management make informed decisions to improve customer experience and increase sales.
- ✓ **CI in eCommerce** — Customer intelligence data makes it possible for eCommerce platforms or site owners to minimize bounce rates by offering customers more of what they want, and less of what they don't. Because rating systems are now so accessible, the risk of offering even a single bad user experience is high. eCommerce businesses heavily rely on the insights from CI to avoid missteps and keep customers happy.

One unexpected area of growth in CI is in threat intelligence. Customer intelligence teams use PII regularly. They also track consumer behavior. Increasingly, cybersecurity platforms are able to leverage PII to track behavioral trends, identifying aberrations that could point to fraudulent activity. This is a connection to keep an eye on, as it could mean yet another valuable application for the rigorous efforts of CI.

# Customer Intelligence's Interdepartmental Impact:

- ✓ **CI in Post Sales** — For many companies, tracking and supporting the customer journey is an established practice which terminates at the point of sale. But this is a huge mistake. At worst, customers feel a bait and switch: they were deeply cared for and attended to until the company got what they wanted (the sale), after which, they're left to fend for themselves. Maintaining a high level of care for the customer post sale is arguably just as important as everything that happened beforehand. In fact, the data below will illustrate that post sale dynamics are immensely relevant for safeguarding against churn and ensuring long-term customer lifetime value.

# The Interplay of Customer Intelligence and Business Intelligence:

*"There is only one valid definition of a business purpose: to create a customer."*

Peter Drucker

The effectiveness of [business intelligence](#) is only as good as it is thorough, which means it must include methodically gathered and meticulously analyzed customer intelligence data. Having a single view of customer data, and capturing the right value from it, will be a continuous distinction of high-performing businesses worldwide. This is a reality forward-thinking business leaders have faced head on, as the value of CI has caught on company-wide.

<b>CRO</b> The Chief Revenue Officer uses CI data to see active threats to the company's revenue or operations.	<b>CEO</b> The Chief Executive Officer drives business success by aggregating all business intelligence, including CI, to meet goals.	<b>CIO</b> The Chief Information Officer will tap into CI data sets to understand if a customer journey meets regulations and requirements.	<b>CCO</b> The Chief Customer Officer heavily relies on CI to enhance understanding of the customer journey, and create better customer experiences.
<b>CMO</b> The Chief Marketing Officer needs CI to inform marketing efforts, gaining visibility into what does or does not resonate and how customers feel about their experiences.	<b>CPO</b> The Chief Procurement Officer can use CI data to get immediate insight into consumer satisfaction with or interest in current or future products. It is also useful in forecasting.	<b>COO</b> The Chief Operating Officer will use CI data to effectively assess operations, identifying areas of weakness or need in outward-facing efforts and apply improvements as needed.	<b>CTO</b> The Chief Technical Officer will use CI data to identify issues with user interface or technology use both inside and outside the company, leveraging these insights for ongoing improvement.

# Case Studies: CI in Action



Use the data to forecast per CSM, which accounts are at risk and which can be expanded for their SaaS as well as API product.

**Project owner:**

VP of Customer Success

**User cohort:**

8 users

**Data points evaluated:**

2,000

**Revenue predicted to churn in this year:**

\$2,075,400

**Amount churned so far:**

\$210,477



Evaluate which of the existing 66,000 customers can be sent for expansion to the right team vs which can be sent to the churn risk team.

**Project owner:**

Global VP of Revenue Operations

**User cohort:**

47 users

**Predicted expansion/churn risk for the quarter:**

\$18,083,502.61

**Renewed/Saved in last month:**

\$7,614,734.95

**Data points evaluated:**

120,000



Partstrader is using involve.ai to understand which of their voluntary accounts will come back to the system and use Partstrader and increase transactional data usage.

**Project owner:**

VP of Customer Success

**User cohort:**

2 users

**Marked:**

~\$12,000,000 at risk

**Note:**

Partstrader compared involve.ai to an in-house system they built for the purpose and involve.ai won

**Amount churned so far:**

\$210,477

# New Rules of Customer Intelligence

As with most disciplines, customer intelligence is subject to constant evolution. As new forces enter the market, and new tools are developed, what is possible to know, and then act upon, is ever-changing.

A key point of contrast to eras past is that customer intelligence now benefits from Big Data. A conference paper on Intelligent Information and Database Systems purports that frameworks can be established to use customer intelligence data to support marketing decisions, lending support for “creating, communicating, delivering, and co-creating to offer value.”

Many analysts argue that we are in a season of Customer Intelligence 2.0. At [involve.ai](#), we like to think of it as a movement. And some of the new rules of customer intelligence are these:

- As retail formats change, so does the customer experience, which means that tools for data gathering and measurement must be elevated to accommodate more data from more diverse sources.
- Due to hypercompetitive markets, customer retention is becoming one of the most important metrics for long-term success in any industry. CI functions that can adequately prevent churn will be the most useful, probably to the exclusion of all others.
- There is an ever-growing consumer demand for personalized experiences, which often exceed the capacity of any sales, marketing, or customer service teams. In the future, companies will have to use platforms that provide a hybrid of human and AI technologies to serve customers as efficiently and personally as possible.

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Related Reading:

[involve.ai Patents Artificial Intelligence Model to Identify Early Churn and Expansion Opportunities](#)

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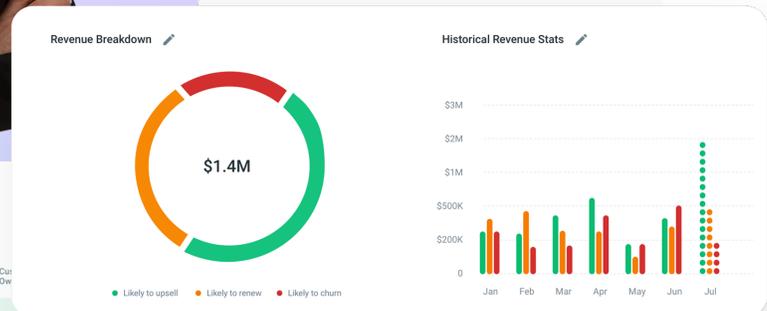
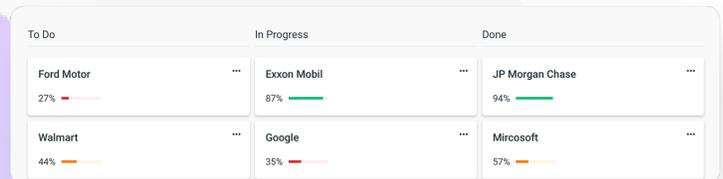
# New Rules of Customer Intelligence

## Personalization at Scale

The idea of serving as many customers as possible, while still relating to them on a personal level, may be the next problem CI has to solve.

Business operations and revenues may rely on tech-enabled, human-led service.

This will vary by industry, but everything from voice AI to predictive algorithms are steadily gaining adoption that could transform a company's capacity to offer this elite level of service, even down to an individual level.



Customer Health Data									
Customer Name	Product Usage	NPS/CSAT	Interaction Frequency	Number of Support Tickets	Severity of Support Tickets	Customer Sentiment	Customer Ownership	Health Score	Change
Walmart	High	High	Medium	Low	Medium	High	High	80%	+2%
Google	Medium	Medium	High	High	Low	Medium	Medium	65%	+1%
Ford Motor	Low	Low	Medium	High	Medium	Low	Low	70%	+3%
Exxon Mobile	High	Medium	Low	Medium	Low	High	Medium	90%	+5%
JP Morgan Chase	High	High	Low	Low	Low	High	High	90%	+5%
Berkshire Hathaway	Medium	Medium	High	High	High	Low	Low	55%	+2%
United Health Group	Low	Low	Medium	High	High	Low	Medium	40%	0
McKesson	Low	Low	High	Medium	Medium	Low	Medium	55%	+5%
AT&T	High	Medium	High	High	Low	Medium	Low	76%	+1%
Costco Wholesale	Medium	Low	Low	Low	High	Low	High	30%	+6%
Chevron	Medium	High	Medium	Low	Medium	High	High	96%	+2%
General Motors	Low	Does not Exist	Medium	Does not Exist	Does not Exist	High	Low	66%	0

# Customer Insights and Analytics Maturity

It should be clear by now that raw data, or mere data, is insufficient to activate truly great customer experiences, which is the ideal outcome of customer intelligence. Customer insights and analytics maturity are essential to truly mining the depths of what can and should be known about customers to better serve them.

## There are four stages to customer analytics maturity:

1. Descriptive analytics, or knowing what happened in a scenario or with a customer.
2. Diagnostic analytics, or knowing why an incident or instance occurred with a customer.
3. Predictive analytics, or knowing what is likely to happen next with a customer.
4. Prescriptive analytics, or knowing what should be done about an incident with a customer.

In this traditional model, most companies halt after diagnostics. It is rich and important to understand why a customer experience occurred, and most skip directly from that to reacting, or engaging in prescription. Even setting protocol for problems that occur misses the all-important prediction phase. Because companies have operated largely in a reactive state, CI teams pass information along that amounts to a rearview mirror: everyone can see what happened, and why, but true foresight is absent. That is a key problem the team at involve.ai observed and has solved.

# Reactive ➡ Proactive ➡ Predictive

The step most companies take beyond reacting to an incident is to think proactively:  
What processes can we set in place to prevent this from happening next time?

This is almost always the nature of churn prevention activities. The problem is, humans are infinitely complex, and too often companies are blindsided by churn, unable to see a tipping point of fulcrum of customer sentiment. Lacking that advanced insight, they can take proactive steps to nurturing customers and providing great experiences, but without predictive capabilities, they will still miss too many signals.

**That is what involve.ai provides.**

Our first-of-its-kind customer intelligence platform is truly revolutionary, because we move CI teams (and everyone in the business) from reacting to customer problems or loss to being able to predict and prevent it. Very effectively. All of the time.

It's easier if we just show you: [BOOK A DEMO](#)

Or, here are some illustrations of the outcome:

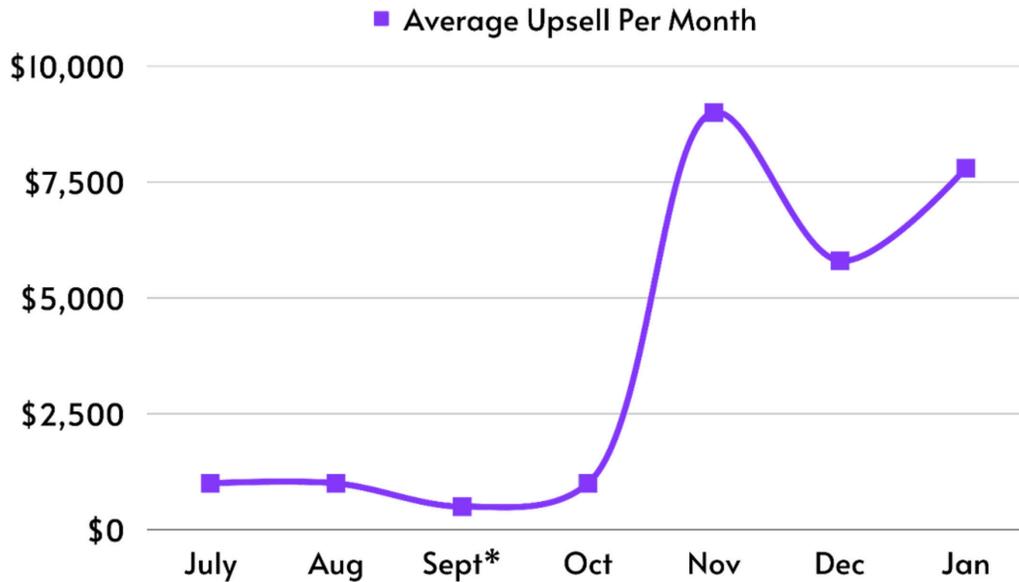
## The Data:

Not all customer intelligence activities or systems are created equal. The way that the involve.ai collects, organizes, and delivers data provides unique insights and perspectives that support customer intelligence in a way no other platform can. This is because it is a novel technology, and the proof of its superior effectiveness is visible.

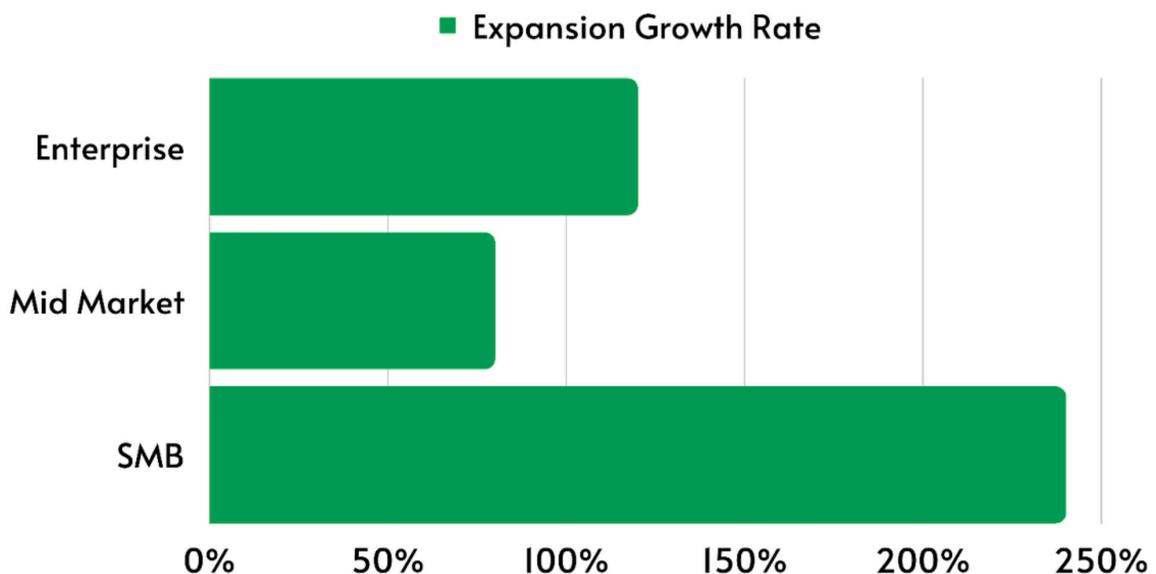
Here are some examples of data directly from involve.ai clients that showcase the compelling power of customer intelligence done right.

# Reactive → Proactive → Predictive

**Graph 1:** Client implemented involve.ai in September and started seeing drastic change in their upsell in the following months.

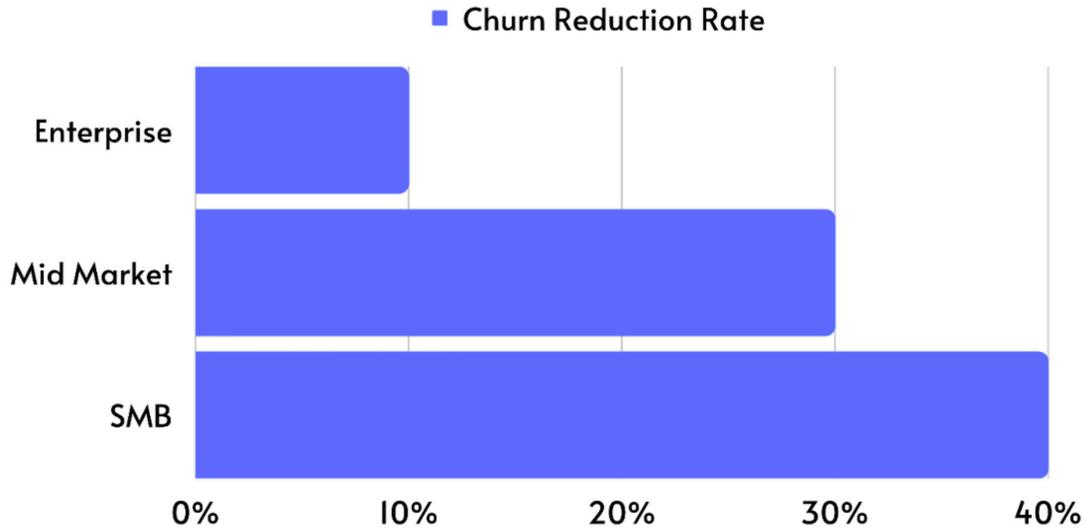


**Graph 2:** Growth in the market is essential for business survival. This graph shows involve.ai's impact on expansion across market segments hits triple-digits without fail.

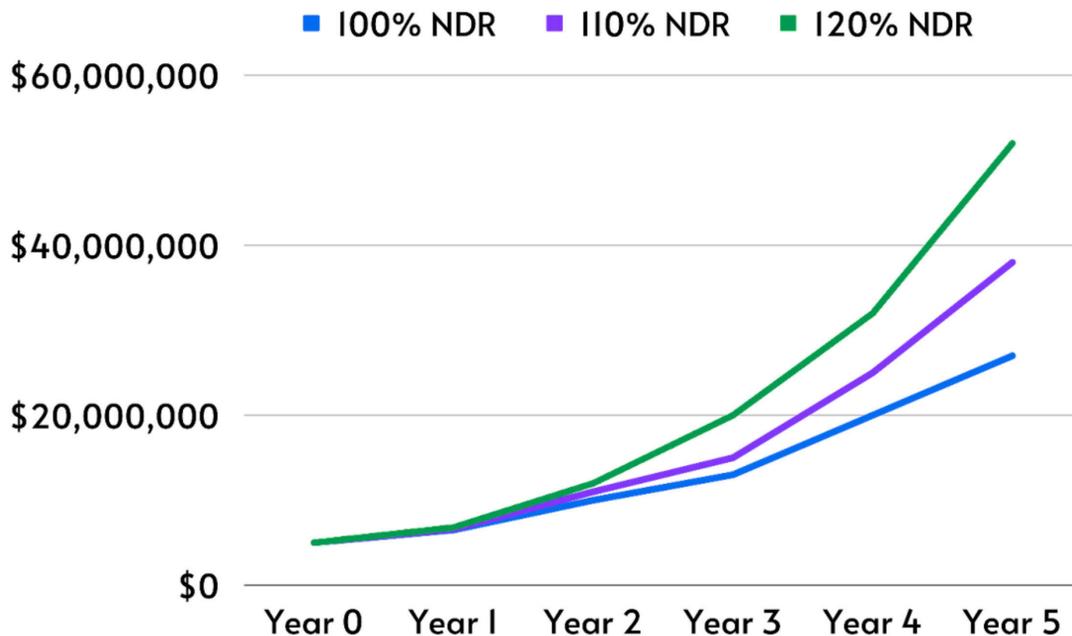


# Reactive ➔ Proactive ➔ Predictive

**Graph 3:** Churn reduction is a frequently-touted goal of any customer intelligence efforts. This is an illustration of that all-important metric, achieved by insights from involve.ai's platform.

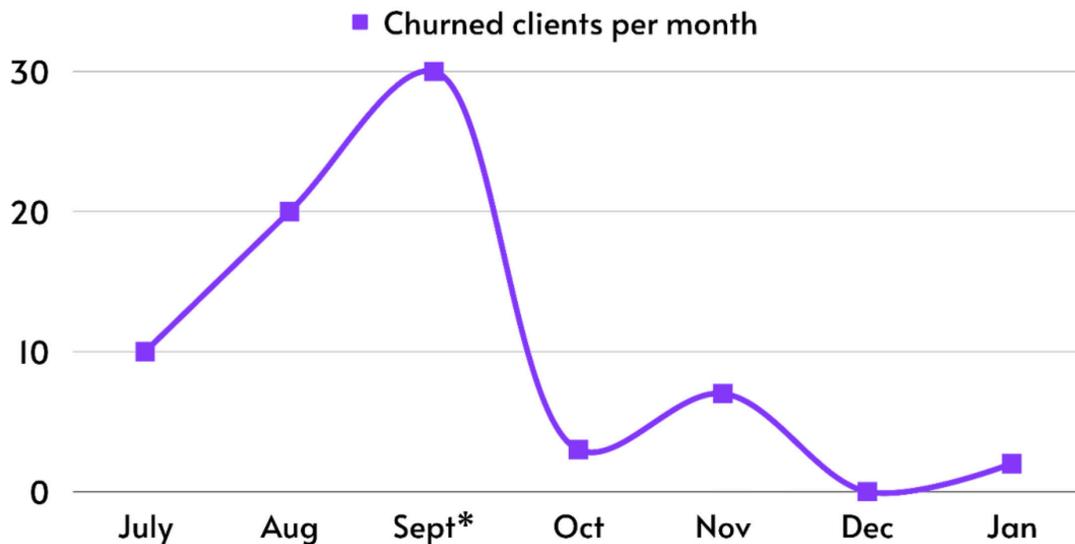


**Graph 4:** The importance of retention is hard to state in full: it is absolutely vital to the future health and profitability of a company. This graph highlights ARR growth over 5 years.



# Reactive ➔ Proactive ➔ Predictive

**Graph 5:** The difference between September and corresponding months on this graph is impacted by the installation and use of involve'ai's CI systems.



## Strategic Insights From Correlations Across Datasets

Data is important and meaningful, and here are some of the key points that can be gleaned from data sets like those shown above.

### KEY POINT 1

#### NPS Doesn't Matter

At least not as much as everyone thinks it does. The way NPS is scored by many companies is inadequate: they ask questions too early in the customer journey to gain real insights.

### KEY POINT 2

#### Support Volume and Severity are Early Churn Indicators

Can Support tickets tell a good story? Turns out that support tickets are a goldmine of valuable customer experience information.

**For some customers, a high number of low severity support tickets show 90% chance of high engagement from a customer and for many customers showed 60% chance of upsell opportunities.**

# Reactive ➔ Proactive ➔ Predictive

## KEY POINT 3

### The Impact of Training Varies for Products

If a core function of your customer service training process is product training, you may be wasting time. Early insights show that training doesn't dramatically affect customer service effectiveness for certain types of products.

## KEY POINT 4

### FTV and Rapid Time to Value Isn't Always a Good Thing

Poor adoption hampers this, and FTV shouldn't be observed or acted upon in a vacuum: it has to be considered along with other indicators if it's going to work.

## KEY POINT 5

### Webinars are One of the Best Ways to Increase Engagement

How you connect with customers does matter (not just whether or not you do). Video, especially face-to-face and training-related content, are becoming one of the most noteworthy and effective ways to make productive connections and increase engagement.

## KEY POINT 6

### Communication Cadence and Frequency Matters

Customer profiling and segmenting is important to ensure that customers get touchpoints that best suit their needs. For some, it's a lot. For others, it's less. This level of customization is only possible if you have the right data to know what customers want.

# From Customer Intelligence to Customer Intimacy

Whatever you do, customer-centricity is the right approach for organizational performance. In any business, the customer is the most important player. Customer intelligence seeks to fully understand who this customer is so your team can better serve them. Acting on customer intelligence results in what we like to call customer intimacy.

It means that you are close to your customers, regardless of actual proximity. You have leaned in, and there is mutual understanding and respect. You know what they need. You know what they want. You know when they are unhappy and what to do about it. All of the big question marks are removed, leaving only a roadmap for success.

## **An early study on customer intimacy produced the following points:**

“Customer intimacy. . . refers to a close and comprehensible relationship between firms and customers. [It] can lead to positive emotional feelings of trust, comfort, and commitment.”

The study confirmed the following:

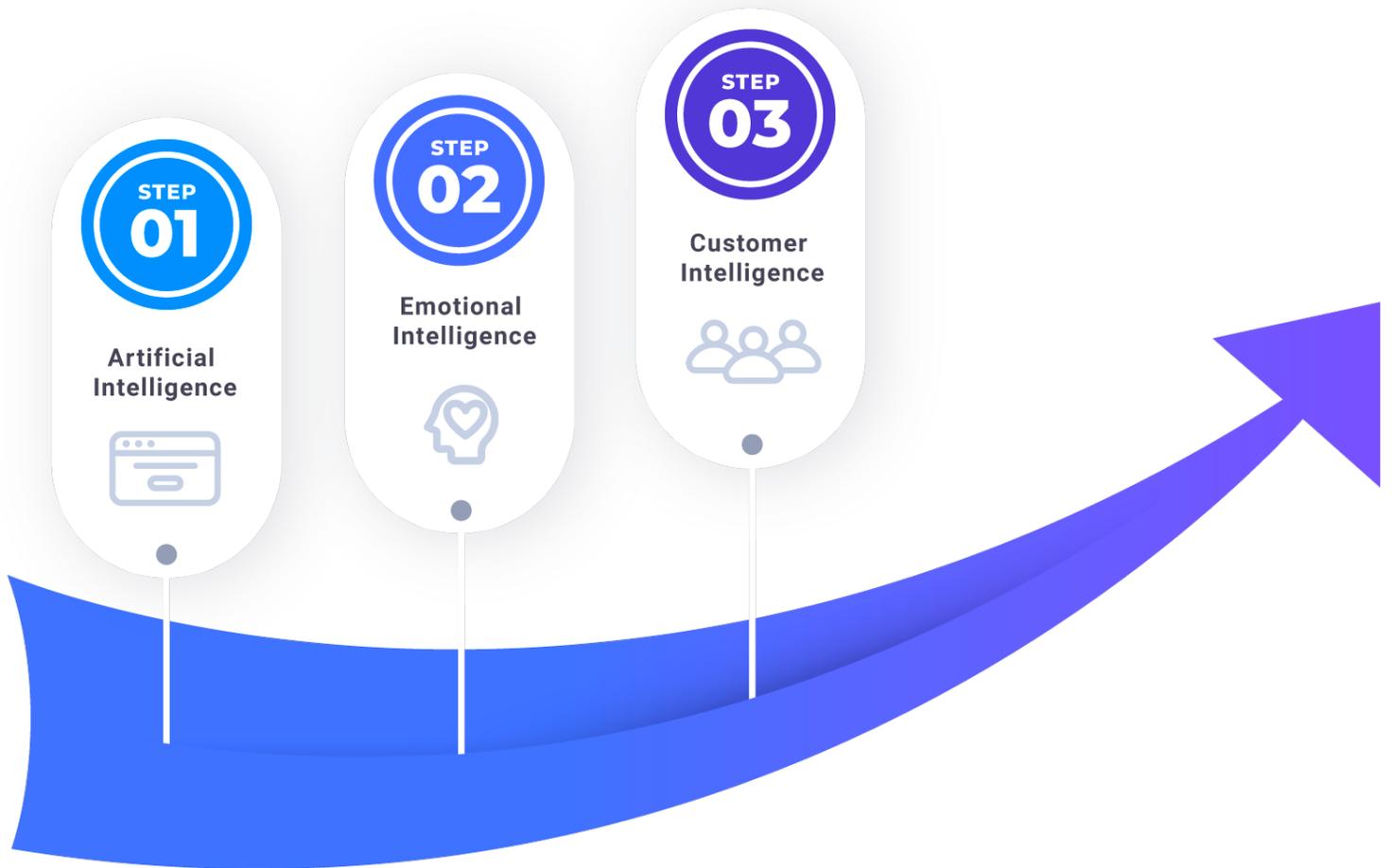
- The salience of intimacy and passion are two dimensions of firm-customer relationship that influence customer loyalty.
- Businesses have a facilitating role in fostering customer-company affection that builds customer loyalty.
- Personalized services generate an emphatic response that strengthens trust, and which customers themselves will act to protect.

Getting close to customers isn't just for certain kinds of brands in certain types of industries. It is an essential tactic that all businesses of the future must deploy to succeed.

# A Trifecta: Artificial Intelligence, Emotional Intelligence, and Customer Intelligence

The trifecta of disciplines to achieve ideal results here includes artificial intelligence (technology and automation), emotional intelligence (maturity and empathy), and customer intelligence.

If these three are developed in step, CI teams will see consistent and measurable results for their work.



# Retain, Grow, and WOW: The Future of CI

At involve.ai, we uphold the power and potential of the CI function with great fervor. We also realize that most CI functions fall short, because they fail to see into the future.

We've helped organizations effectively implement and run a digital model because they had the insights to understand what customers are at risk and what action is needed. This is the sweet spot of CI and creates a positive ripple effect across all areas of an organization.

Rather than assign a CSM to hundreds of accounts and hope for the best, business leaders in any department can look at thousands of customers and take the right action.

Imagine if you could anticipate your customer's every need, surprising and delighting them without them ever having to ask? That is the world we imagine, and one which we've made a reality.

Contact us to learn more: [contact@involve.ai](mailto:contact@involve.ai).