

DEGREE PROJECT

CRM of the Near Future

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GUIDE : MAMATA N. RAO

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IT INTEGRATED DESIGN FACULTY (INTERACTION DESIGN)



राष्ट्रीय डिज़ाइन संस्थान
NATIONAL INSTITUTE OF DESIGN

The Evaluation Jury recommends AMIT SHARMA for the

Degree of the National Institute of Design
IN IT INTEGRATED DESIGN (INTERACTION DESIGN)

herewith, for the project titled "CRM OF THE NEAR FUTURE"
on fulfilling the further requirements by*

Chairman

Members :

Jury Grade : _____

*Subsequent remarks regarding fulfilling the requirements :

This Project has been completed in _____ weeks.

Activity Chairperson, Education _____

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Signature :

Date :

CRM of the Near Future

Acknowledgment

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I would also like to extend my gratitude to Mamata. N Rao, Senior Faculty, IT Integrated design, Discipline lead - Interaction Design, for her guidance and valuable feedback through the course of the project. I would also like to thank my project mentor at Microsoft India, Abhay Vyas, my manager Vimal Sharma and the members of the Dynamics 365 team for their support and guidance during my tenure.

I am also indebted to friends at NID and my family for the constant motivation, advice and encouragement.

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Introduction

Project Introduction

In the enterprise world, CRM acts as a backbone in running the business - from sales, marketing to customer service. With the advent of distributed computing, ML & AI. The focus has moved to how devices & apps can make the life of the user more productive by understanding the users context. Every process in a business is being digitized at an ever increasing rate. This rapid shift means customers are looking to move away from monolithic suites that perpetuate disconnected data silos and expensive custom extensibility frameworks to real time contextual applications which serves the role & job at hand.

As a part of the Dynamics 365 team. The theme of the project is to envision the future of CRM systems. The project aims at understanding the core CRM Business need, Identify opportunity areas and future map scenarios to build modular business applications on mobile that are part of a connected data graph, enabling AI and extensibility that spans the customer's business process needs. Leveraging on Microsoft products such as Office, Cortana Intelligence Suite, Dynamics, Microsoft and LinkedIn graph.

National Institute of Design

The National Institute of Design (NID) is internationally acclaimed as one of the foremost multi-disciplinary institutions in the field of design education and research.

NID has also been declared as 'Institutions of National Importance' by the act of Parliament, by virtue of National Institute of Design Act, 2014. NID is recognized by the department of scientific and Industrial Research (DSIR) under ministry of science and technology, Government of India, as a scientific and industrial design research organization.

NID has been a pioneer in design education and is known for its pursuit of design excellence to make 'Designed in India, Made for the World' a reality. NID graduates have made a mark in key sectors of commerce, industry and social development by being catalysts and through their thought leadership.



NID, R&D Campus, Bangalore

NID's R&D Campus at Bangalore was set up as a joint initiative of the Department of Industrial Policy and Promotion (DIPP), Ministry of Commerce and Industry and Ministry of Information Technology, Government of India and was inaugurated in March 2006. Currently 5 programmes are offered from this campus which include Interaction Design, Information Design, Design for Retail Experience, Universal Design and Digital Game Design.

NID's Research & Development Campus addresses the immediate need for an exclusive Design Research Centre in the country, by fostering the creative design spirit and sighting new opportunities and frontiers through NID's design acumen nurtured over the four decades of intense teaching-learning process.



Interaction Design at NID

The interaction design program at NID would focus on aspects of design and behavior of various forms of digital products ranging from mobile, web based to dynamic ones in gaming, education, transportation, healthcare, banking, retail and other domains.

This program is offered as a two and half years Master of Design program in interaction design. This program educates the students on concepts, theories, practices and processes in the area of interaction design. The design projects and courses aligned for the various semesters progressively move from being able to communicate concepts, web & mobile platforms, to dynamic interactive interfaces and finally to look at product appliances & interfaces with strong relationship to physicality of the space context.

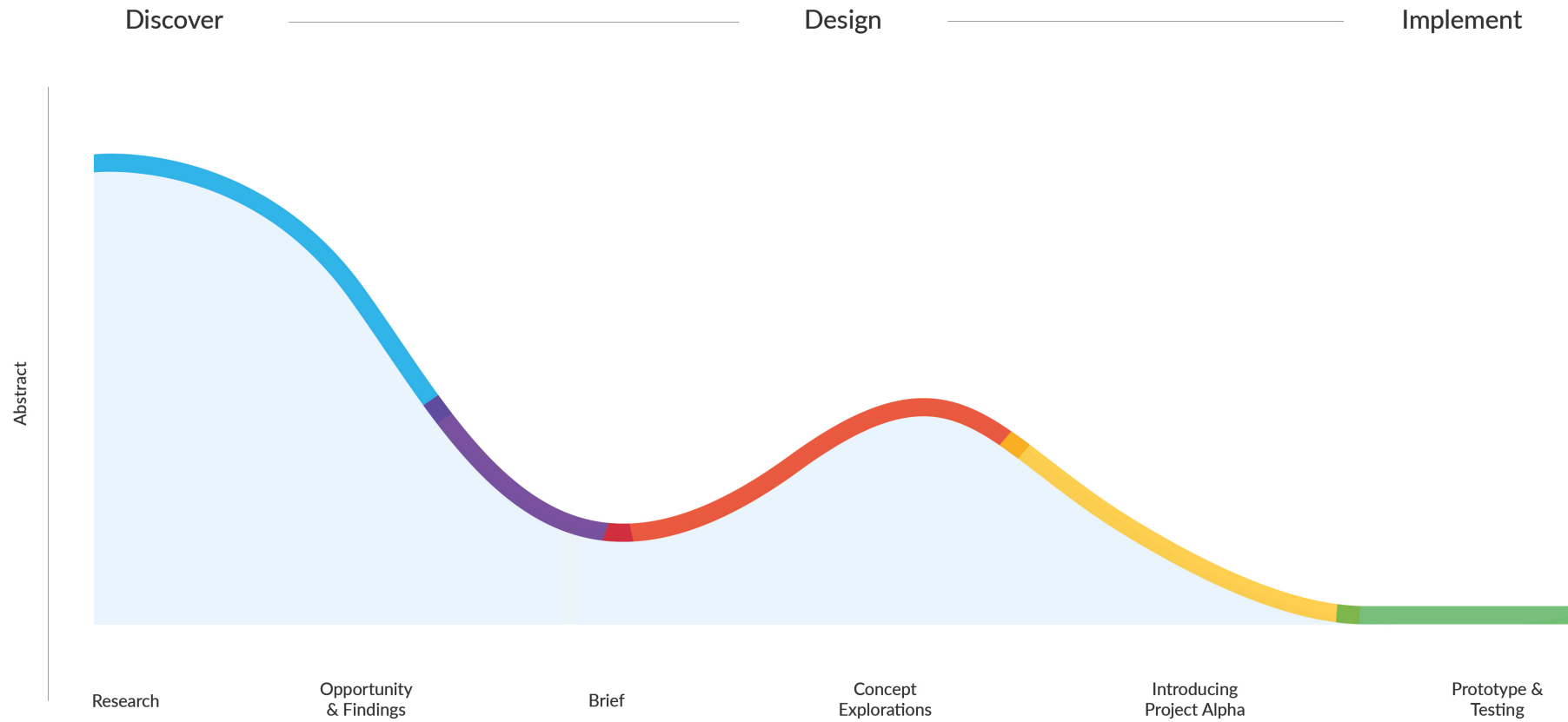
The program is a research driven and provides importance to various dimensions/aspects of interaction design: Sensory-perceptual - cognitive - behavioral and sociocultural-aesthetic etc.

Microsoft R&D, India

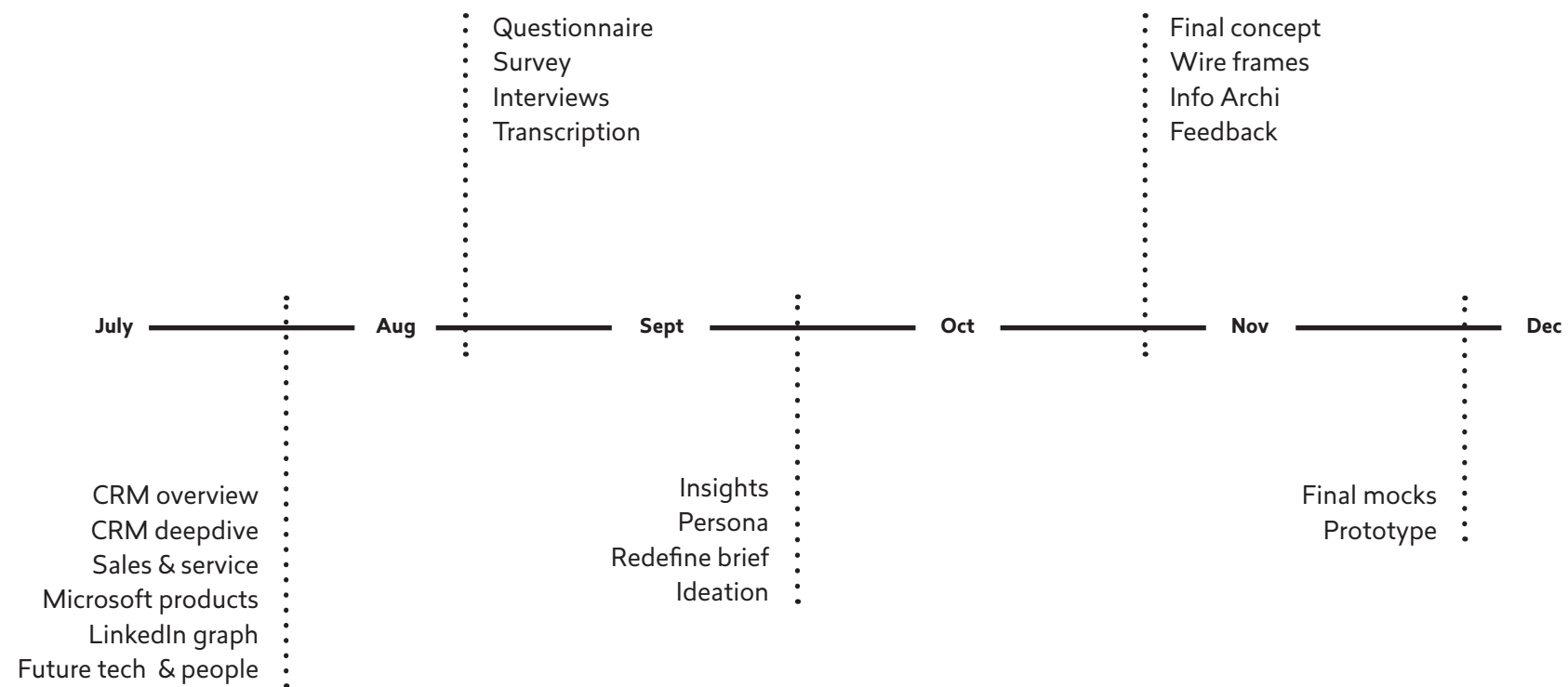
Microsoft India Private Limited is a subsidiary of American software company Microsoft Corporation, headquartered in Hyderabad, India. The company first entered the Indian market in 1990 and has since worked closely with the Indian government, the IT industry, academia and the local developer community to usher in some of the early successes in the IT market. Microsoft currently has offices in the 9 cities of Ahmedabad, Bangalore, Chennai, Hyderabad, Kochi, Kolkata, Mumbai, the NCR (New Delhi and Gurgaon) and Pune. Increasingly, the company has become a key IT partner of the Indian government and industry, supporting and fueling the growth of the local IT industry through its partner enablement programs.

Microsoft India Development Center (MSIDC) is Microsoft's largest software development center outside of their headquarters in Redmond, Washington. The MSIDC teams focus on strategic and IP sensitive software product development. Microsoft takes mega city office space in Bangalore

Design Process



Design Timeline



Brief

To Design CRM* of the Near Future and build a modular business application on **mobile**

Leveraging on :



Graph &
Products



Graph &
Products

* The D365 CRM team at Bangalore focused only on Sales and Service verticals

Secondary Research

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What is a CRM System?

/ the what & the who

“How you gather, manage and use information will determine whether you win or lose.” -Bill Gates

CRM stands for customer relationship management. It's a category of integrated, data-driven solutions that improve how you interact and do business with your customers. CRM systems and applications are designed to manage and maintain customer relationships, track engagements and sales, and deliver actionable data—all in one place.

What can a CRM System do?

CRM solutions streamline processes and increase profitability in your sales, marketing, and service divisions. A strong CRM solution is a multifaceted platform where everything crucial to developing, improving, and retaining your customer relationships is stored. Without the support of an integrated CRM solution, you

may miss growth opportunities and lose revenue because you're not maximizing your business relationships.

Imagine misplacing customer contact information, only to learn that your delay pushed your client into the arms of a competitor. Or, picture your top two salespeople pursuing the same prospect, resulting in an annoyed potential customer and some unfriendly, in-house competition. Without a centralized program where your people can log and track customer interactions, your business falls behind schedule and out of touch. [1]

CRM target audience

CRM systems attempt to serve three pipelines in any business - Marketing, Sales

and Service.

Marketing - With the rapid boom of modern technology and spread of social media channels, customers have become increasingly fussy, discerning and tech-savvy. They know what they want, they have a wide choice, and they are not to be fed with just anything. Instead they demand personalized and diverse ways of engaging with products and services.

And that is why the good old method of targeting all with one message is not working any more. In fact, according to the 2013 Online Personal Experience study released today by Janrain, 74% of online consumers get frustrated with websites when its content, offers, or ads have nothing to do with their interests.

One of the most difficult tasks for marketers'

is to look through all of the customer data. In order to get a response from potential customers that are most likely to buy, marketers need to send out messages that appeal exactly to them.

Fortunately, CRM software helps marketers to sift through contacts and target potentially profitable customers. CRM software contains various information on the customer behavior and preferences, which allows to take informed actions that will improve prospect awareness and customer satisfaction.[2]

CRM can help analyze whether your campaigns were successful and yielded any results. This takes out all guesswork and opinions and helps you only focus on those campaigns that were the best performing.

Sales - When valuable information about customers, prospects, and order details is scattered across spreadsheets and email accounts, it can be impossible to find what you need. CRM software centralizes that information and makes it accessible to the entire sales team.

It helps in prioritizing most promising and important deals, assign leads as they come in, and set up automated reminders to follow up. Staying on top of things ensures that important prospects don't slip away.

CRM reporting and analytics help review a team's sales numbers, pipeline, and activities. With many CRM platforms, you can compare actual sales to quotas and easily pull up your sales history, lead volume, and the common traits of stalled deals. [3]

Service - Customer Service consists of contact handling and executing basic customer transactions. For better or worse, this is your basic call center, often viewed by executives as the complaint department and a necessary nuisance. Even this function is quite profitable in that it retains the revenue of customers that otherwise would take their business elsewhere. On average, the revenue retained from handling a complaint is two to five times the loaded cost of handling the contact alone.

Strategic Customer Service not only addresses basic service contacts and transactions but also includes three other activities within the contact center context:

- Gathering Voice of the Customer (VOC) information, quantify the revenue cost of inaction and inputting the VOC into other departments
- Creating customer engagement via microbursts of emotional connection (usually in 20-40 seconds)
- Preventing future contacts and delivering additional value via education

CRM is often viewed as a software system. Its impact goes far beyond software to include - Tracking and managing customer purchases and contact at major touch points including the phone, email, chat and social media. Customer history and segmentation information is provided to the Customer Service Representative (CSR) to identify the most appropriate sales offer and manage the sales process. Surveying customers after the contact. The results are included in the database for reference by the next CSR. While customer history guides sales activities, almost all CRM activities are still reactive. [4]

CRM helps in understanding the customer's experience across all silos. Identify opportunities for the company to be proactive. Expand the Voice of the Customer to include events that the customer often does not communicate. Create online communities to provide support, fun, content, and engagement and to gather ideas from the customer base. Become preventive by identifying potential customer unpleasant surprises and needs and warning the customer on the website and via onboarding videos and literature.

History of CRM Systems / the why

The first CRM software programs were one-dimensional where filing cards with customer details were filed and used. Today, information technology has revolutionized this type of software. But its basic goal remains the same: using customer data to create sales. [5]

There have been five milestones thus far in the evolution of CRM software:

- Enterprise products
- Web-based solutions
- Cloud-hosted technologies
- Social media applications
- Mobile technologies
- Artificial Intelligence

We see how CRM systems evolved from physical Rolodex to systems with complex capabilities[Fig.1]injust30years.Thesedays CRM systems have become the backbone of any medium and large enterprise, used to keep track of mainly three verticals - marketing, sales and service.

[Fig.2] tries to map down major technological milestones and see how CRM systems adapted to them.

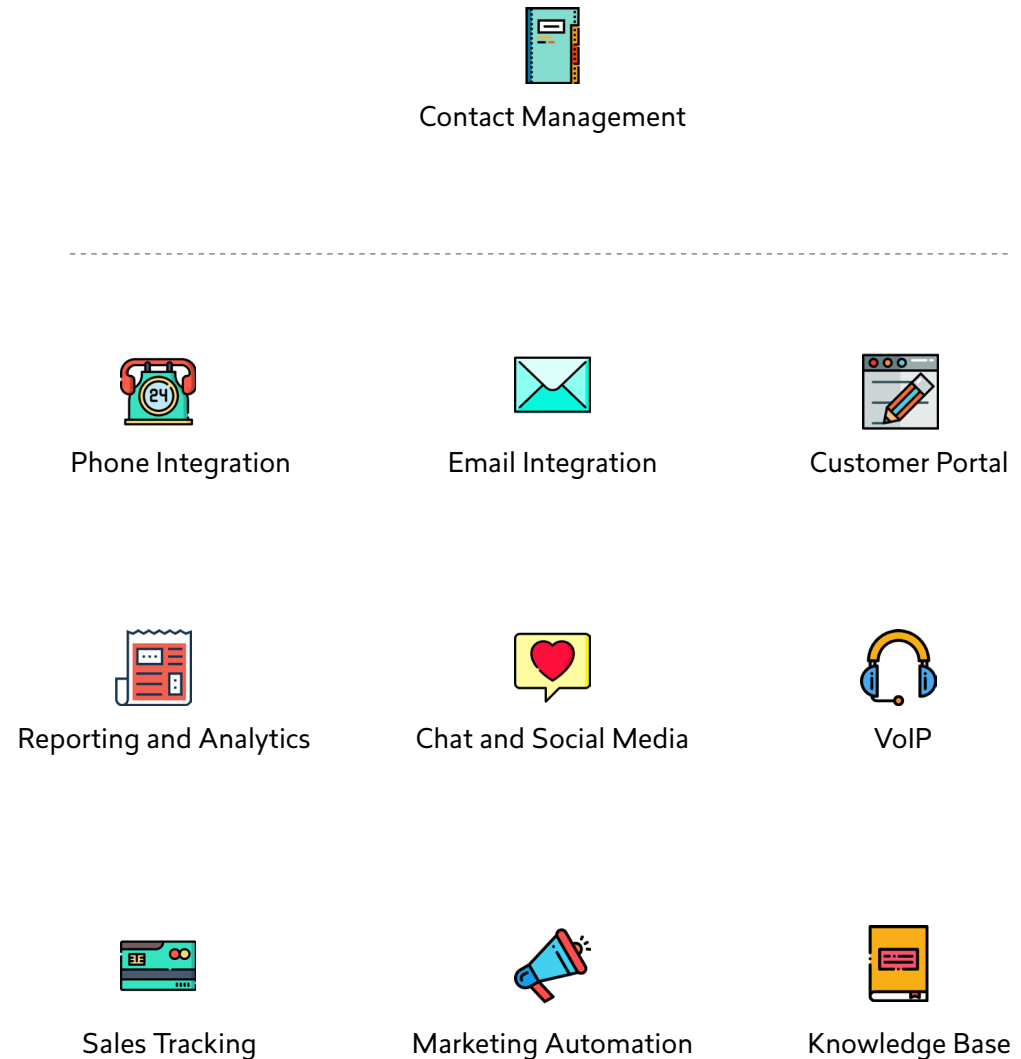


Fig 1. Functions of a CRM system

History of CRM Systems

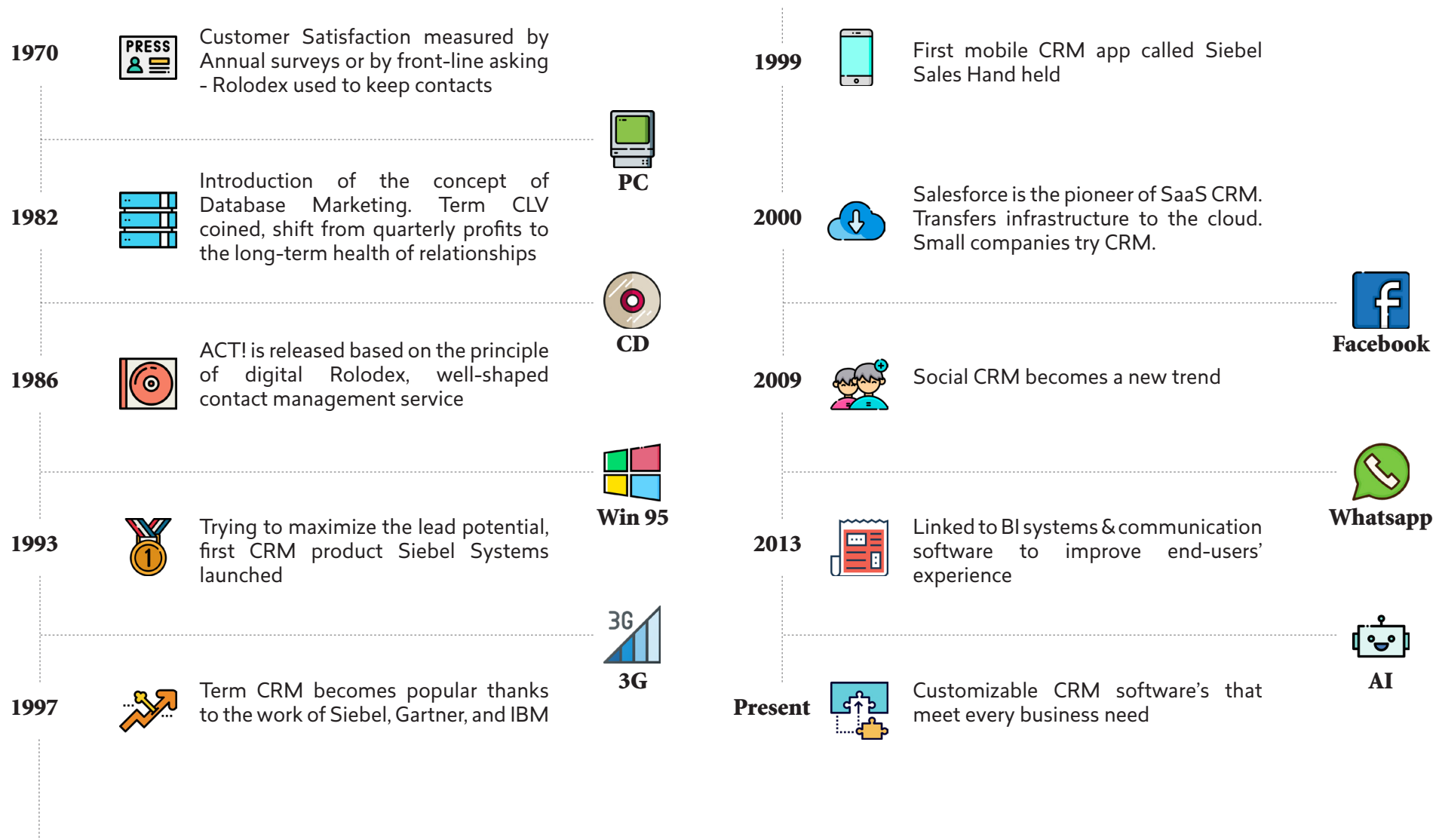


Fig 2. History of CRM systems

Typical Sales Process

A sales process is a set of repeatable steps that your sales team takes to convert prospects into customers. Building a sales process is absolutely necessary to your company's success, and is perhaps the most important thing you can do as a sales manager to impact your team's ability to sell.

The seven steps of the sales process provide a good outline for what you should be doing to find potential customers, close the sale, and retain your clients for repeat business and referrals in the future.

1. Prospecting

The first of the seven steps in the sales process is prospecting. In this stage, you find potential customers and determine whether they have a need for your product or service—and whether they can afford what you offer. Evaluating whether the customers need your product or service and can afford it is known as qualifying.

2. Preparation

The second stage has you in preparation

for initial contact with a potential customer, researching the market and collecting all relevant information regarding your product or service. At this point, you develop your sales presentation and tailor it to your potential client's particular needs.

3. Approach

In the approach stage, you make first contact with your client. Sometimes this is a face-to-face meeting, sometimes it's over the phone. There are three common approach methods.

- Premium approach: Presenting your potential client with a gift at the beginning of your interaction
- Question approach: Asking a question to get the prospect interested
- Product approach: Giving the prospect a sample or a free trial to review and evaluate your service

Sales Stages



4. Presentation

In the presentation phase, you actively demonstrate how your product or service meets the needs of your potential customer. The word presentation implies using PowerPoint and giving a salesy spiel, but it doesn't always have to be that way—you should actively listen to your customer's needs and then act and react accordingly.

5. Handling objections

Perhaps the most underrated of the seven steps of a sales process is handling objections. This is where you listen to your prospect's concerns and address them. It's also where many unsuccessful salespeople drop out of the process—44% of salespeople abandoning pursuit after one rejection, 22% after two rejections, 14% after three, and 12% after four, even though 80% of sales require at least five follow-ups to convert. Successfully handling objections and alleviating concerns separates good

salespeople from bad and great from good.

6. Closing

In the closing stage, you get the decision from the client to move forward. Depending on your business, you might try one of these three closing strategies.

1. Alternative choice close: Assuming the sale and offering the prospect a choice, where both options close the sale—for example, “Will you be paying the whole fee up front or in installments?” or “Will that be cash or charge?”
2. Extra inducement close: Offering something extra to get the prospect to close, such as a free month of service or a discount
3. Standing room only close: Creating urgency by expressing that time is of the essence—for example, “The price will be going up after this month” or “We only have six spots left”

7. Follow-up

Once you have closed the sale, your job is not done. The follow-up stage keeps you in contact with customers you have closed, not only for potential repeat business but for referrals as well. And since retaining current customers is six to seven times less costly than acquiring new ones, maintaining relationships is key. [6]



Fig 3. Typical sales process

Problems Faced with CRM / Sales

CRM isn't perfect. In fact, most sales reps would probably agree that CRM is just plain annoying. Beyond the frustrating interface, CRM actually contributes to low win rates and high operational costs.

CRM Related Problems

CRM systems have a very **low adoption rate** because it doesn't help sales reps sell, in fact, it hinders them from selling - so they use it as little as possible - as more than **5.5 hours per week are spent on data entry**, just entering information about the leads they are speaking to and conversations they're having and updating any other information, every minute sales reps aren't selling equals lost revenue and reps have to spend a lot of time entering data.

Because reps use CRM as little as possible, they put very little effort into making sure the data they enter is accurate and complete. **91%** of all companies' data is incomplete, outdated or inaccurate and the number one reason for this inaccuracy is human error.

There are three primary leakage points of data.

Mobile Phones - Reps communicate with buyers while they're on the go and then forget to log it into the CRM system.

Office Phones - Everything discussed in a phone call with a buyer doesn't get entered into CRM unless a sales rep remembers all the details.

Email - After sending an email, a rep doesn't want to get out of the "selling zone" by switching from selling activities to data entry. [7]



1/3 Hate CRM - Low adoption rate. It doesn't help them sell - in fact it hinders in the process



5.5h/w Data entry - Just entering activities and contacts instead of selling.



9% Data Accuracy - Data is incomplete, outdated or inaccurate. Reps put little effort into entering data

Everyday Problems

Everyday sales agent need to gather information about their clients, they spend almost **30% of the sales cycle gathering information** so they could tailor their pitch and convert. But getting the right name, contact and time to speak to the C- levels or decision makers is very tedious and time consuming.

After the client is ready to come onboard there are usually **long timelines** between agreeing to try the product and making the final purchase. Competitors might offer a better deal or even have a better product, how does a sales rep understand the weakness of the competitors and always be ready to defend, fend off the competition and keep the client. It is also important to keep the client engaged and hooked to the product till purchase, how much is too much or too less of contact?



Too Many Competitors



Long Timelines



Getting to C- Level

Typical Service Process / Service

Customer service is the process of ensuring customer satisfaction with a product or service. Often, customer service takes place while performing a transaction for the customer, such as making a sale or returning an item. Customer service can take the form of an in-person interaction, a phone call, self-service systems, or by other means. [8]

There various interaction points are as flows -

Customer Service Portal – a help-desk on the website where clients can go to get the answers they need without needing help from your staff.

Social Media – CRM solution should be able to bring your social feeds directly into your CRM software. This let's your staff monitor the feeds and reply as needed.

Phone Support – Most CRM solutions will empower support staff by giving them customer information at their finger tips.
Email – people still email a lot.

Phone Sales – sales department also receive calls because that's who the customers dealt with previously. With that being

said, you need to give your salespeople the ability to log cases manually if need be.

Ideal Customer Service Process

Assign & Verify – the first thing customer service process should do, at this point, is to assign the case to the appropriate customer service representative. This is typically done by categorizing the cases by some set of predetermined criteria and determining which customer service representative is best suited to handle the case.

Identify Solution – next, customer service representative will need to find the appropriate solution. In an ideal setup the customer service representative would have the ability to search a database of possible solutions.

Deliver Solution – once identified, customer service representative will need to 'somehow' deliver the solution.

Rework the Case – if the solution fails, the case is automatically rerouted back to the "Identify Solution" stage.

Escalate & Reassign Case – if the case

hits a certain threshold, it should then be escalated to the next level and reassigned to the appropriate customer service representative.

Close the Case – once the case has been resolved, the data collected should be used to help improve the customer service process.

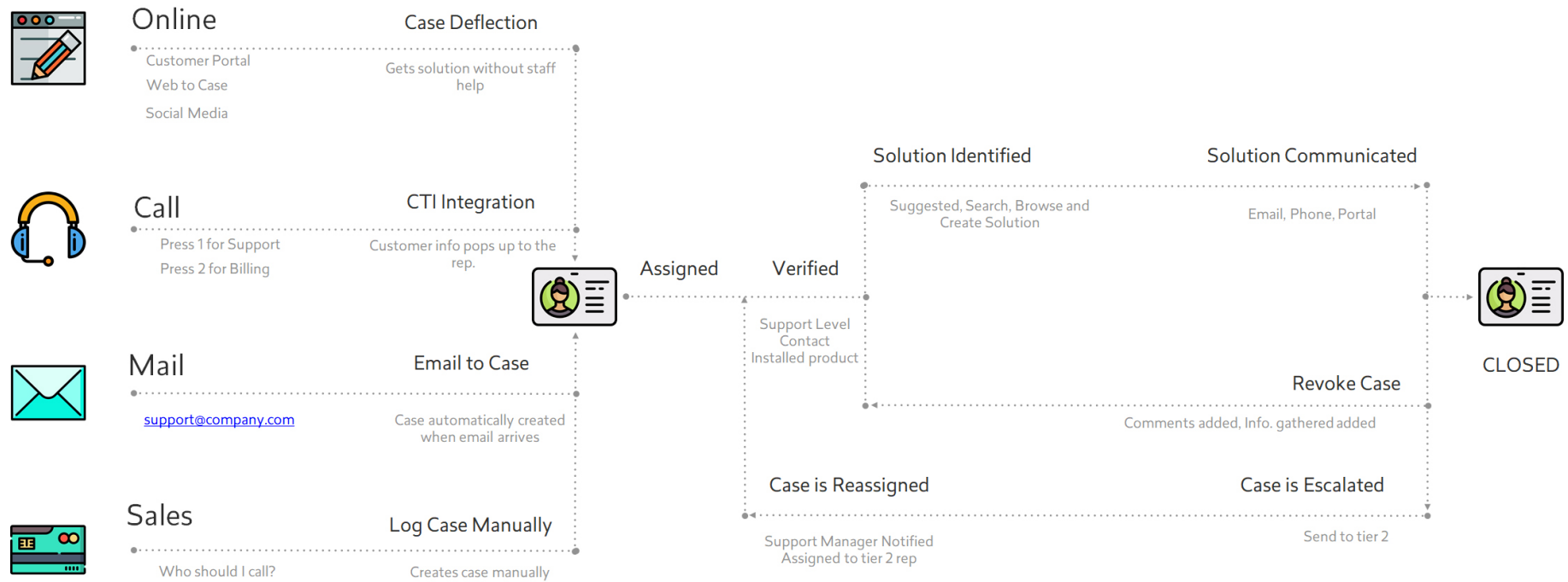


Fig 4. Typical service process

Problems Faced with CRM / Service

Although CRM has certain key benefits of safe storage, knowledge base query, and providing a single view of the customer, there are still some issues that the customer service agents face on a day to day basis using it.

CRM Related Problems

Days to Generate Reports - a customer service representative has to break away from her/his flow and manually input data into the CRM system to keep the data about the customer up to date. This takes significant amount of time, sometimes this is done at the end of day, end of week or even end of month depending upon the framework of the organization.

This makes the entire very reactive - as the same mistakes will be made over and over again before it can come to notice when the data is finally entered.

Legacy ways of Reporting - The most widely used KPI (Key Progress Indicator) used across the service industry is **AHT (Average Handling Time)** - i.e., the average time spent to resolve a customer's query. But as more and more users got access to the

Internet and self service portals got better and better, customers stopped calling for trivial issues, they attempted finding solutions on their own and only called in if they found no way out. These issues require the agent to use his wit, intelligence and product expertise to solve the problem.

It also becomes necessary to track the effort the customer has put in before contacting the customer care. This would make sure the customer does not receive fixes she/he has already tried. **CES (Customer Effort Score)** - a type of customer satisfaction metric that



Days to Generate Report - Data is not entered, reports take time to generate.



Legacy Ways of Report - AHT instead of CES - First Contact Resolution - 22% repeat calls are because of downstream issues



Increased Channel Switching - Users switched channels more often increasing the need to have a single view of customer across channels to provide a seamless UX

measures the ease of an experience with a company by asking customers, on a five-point scale of "Very Difficult" to "Very Easy," how much effort was required on the part of the customer to use the product or service to evaluate how likely they are to continue using and paying for it. Is also proven to be a better customer retention metric.

Increased Channel Switching - More and more users are using more than one channel (chat, social, telephone, email etc) to get a resolution to their problem. It is not only necessary to have a single view of the user across these channels but also becomes important to give the user a seamless user experience to the customer when they switch channels. [9]

Everyday Problems

A constant fear in an agent's mind is how should she/he **handle a customer** who is furious and how the agent him/herself keep calm.

Scripts were introduced to give a consistent experience to a customer. But over time they became over used and an annoyance to the customer. The customers now demand

efficiency, and empathetic response from the agent.

Unexpected complex issues are one of the constant fear agents have, what if an issue occurs that are out of the agents scope? How will they handle it and who will they ask for help?



**Handle Angry
Customers**



**Overuse of
Scripts**



**Unexpected
Issues**

Near Future

/ Technology . People . Business

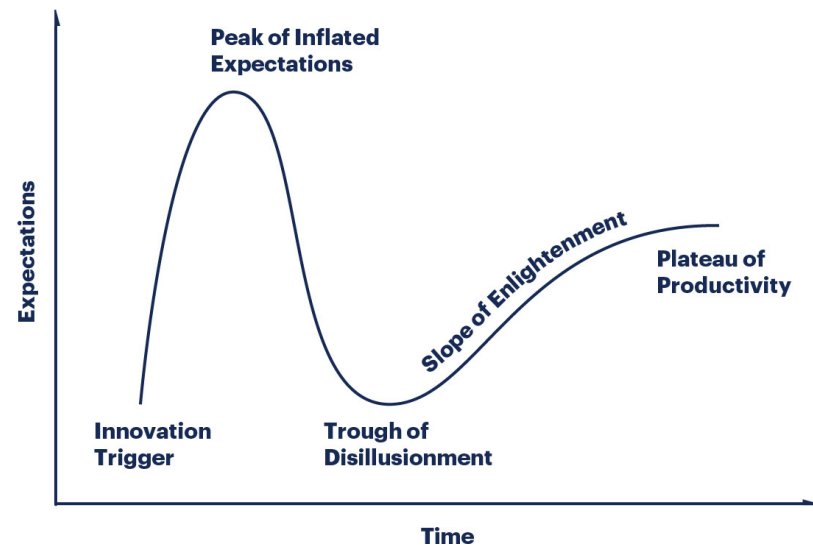
To understand what the near future hold for the enterprise CRM domain we need to understand the upcoming technologies that would reach the mass adoption stage and how can we leverage them to not only better understand the customer and give them a seamless experience but also try to understand how we can better the day to day experience of the agent who is using the system on a daily basis.

We also need to understand who the would make up most of the working class in the next few years and understand what their behavior , needs, aspirations are going to be, so we could create a system that could be easily adaptable to this audience.

To the changing landscape to technology and customer behavior, how would the business understand? We can understand how the businesses will adapt to these changing by understand their vision, their products and focus areas.

Technology of the Future

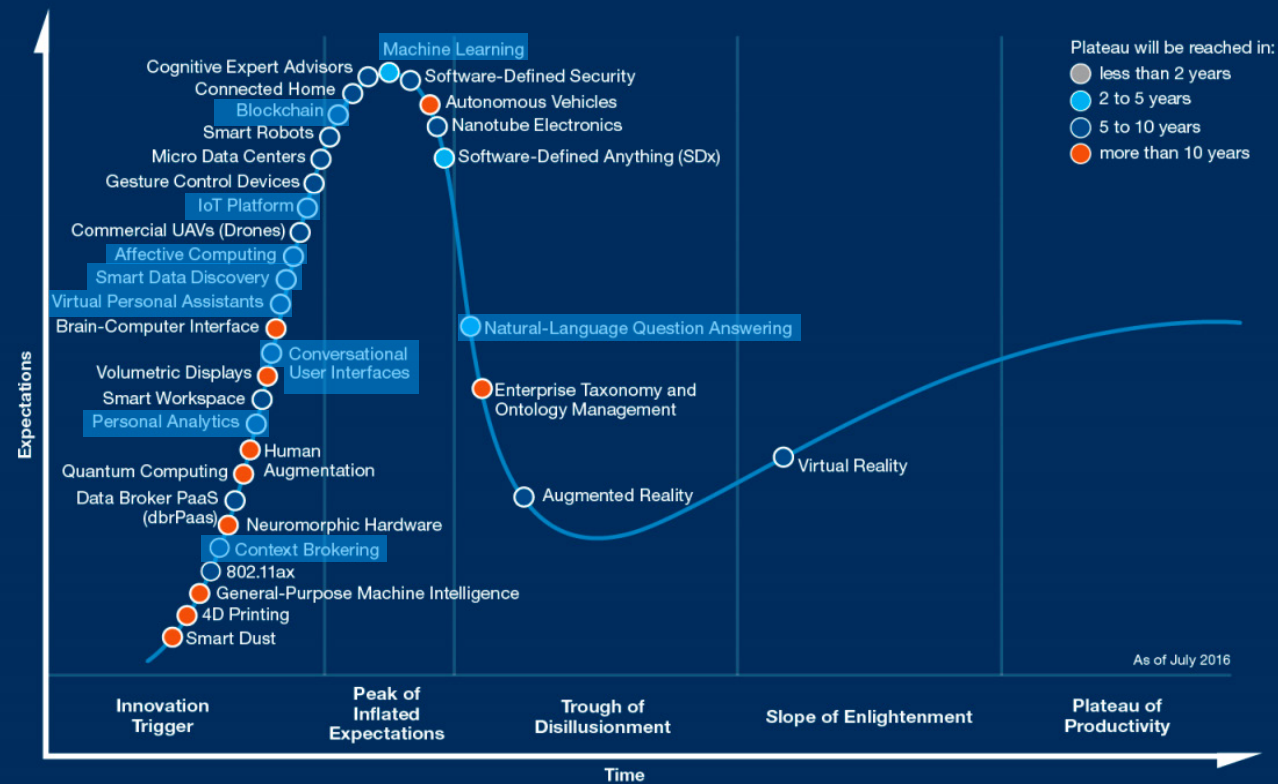
To most widely used metric to understand the technologies is Gartner Hype Graph, published by Gartner. Gartner Hype Cycles provide a graphic representation of the maturity and adoption



of technologies and applications, and how they are potentially relevant to solving real business problems and exploiting new opportunities.

We are concerned with only the near future, 2-5 years. we would only try to under the technologies within that range.

Gartner Hype Cycle for Emerging Technologies, 2016



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Gartner®

Technology

/ Near Future



Artificial Intelligence - Artificial Intelligence is a way of making a computer, a computer-controlled robot, or a software think intelligently, in the similar manner the intelligent humans think.

In the next 2-5 years AI will help automate redundant tasks, providing users with more time for creative tasks. As AI becomes more and more intelligent and reliable it will help in making better decisions and also be proactive with contextual reminders helping in avoiding any error that occur in the current manual process.



Conversational Interfaces - Artificial Intelligence will also lead to the growth of interfaces that used Voice as the interface, personal digital assistance will become more generally aware computers helping in daily tasks. The clear advantages of this technology being low to almost nil learning curve as it uses natural language to converse. This technology is ideal for mobile and the PDAs help users with a large spectrum of tasks.



Internet of Things - The Internet of things (IoT) is the network of physical devices, vehicles, home appliances, and other items embedded with electronics, software, sensors, actuators, and connectivity which enables these things to connect, collect and exchange data.

From smart watches to smart refrigerators to smart city grids, a web of sensors will track our every action. Our wearables will know if we need more calcium, our refrigerator will know if we need more milk, and our car will know the cheapest place to pick it up.

\$15T

The amount GE estimates that Internet of Things technology for industry has the potential to add to global GDP over the next 20 years.

90%

The percentage of cars that will be connected to the Internet by 2020.



Blockchain - By allowing digital information to be distributed but not copied, blockchain technology created the backbone of a new type of Internet. With the acceptance of this technology users will demand more and more transparency with the added advantage of increased security and fast transactions.



Personal Analytics - with computers being ubiquitous and AI in the form of PDAs democratized, users will start to use computers to understand more about themselves and improve based on data.

1.7_{MB}

The amount of new information that will be created every second for every human being on the planet in 2020.

\$1000

In 2016, the cost to sequence your entire genome. In 2001 it cost \$100 million. In 2006, \$25 million.

0.5%

The percentage of all data that is ever analyzed and used.

1.2_{yrs}

The amount of time it takes the volume of global data to double.



Smart Data Discovery - Smart data discovery is a next-generation data discovery capability that provides insights from advanced analytics to business users or citizen data scientists without requiring them to have traditional data scientist expertise. Next best action is the focus from the insights derived. [10]



Context Brokering - Context brokering is a service that enables actions and insights to be generated from broad sources of data and information. It can be applied with different levels of timeliness - from the immediate to the strategic. Immediate context brokering as a service applies advanced forms of computer science to provide actions and insights either to another system or a human. Strategic context brokering, applies the same principles to wide ranging problems that have considerable published literature (often from a scientific or research basis) to map and better inform decisions and insights to be formed around the dataset.



Affective Computing - Affective computing technologies sense the emotional state of a user (via sensors, microphone, cameras and/or software logic). Here the focus is to understand the nuances of human communication and the intent of the command.

Generation Z / Near Future



Gig Economy - In a gig economy, temporary, flexible jobs are commonplace and companies tend toward hiring independent contractors and freelancers instead of full-time employees. A gig economy undermines the traditional economy of full-time workers who rarely change positions and instead focus on a lifetime career.

As Internet becomes ubiquitous, relocation will increase. Changing norms will allow us to de-locate tasks and complete anything from anywhere.

40%

The percentage of the workforce that could be participating in the gig economy by 2020.

68%

The percentage of international survey respondents willing to share assets like tools, electronics, homes and services.



Demand Transparency - With the plethora of IoT devices collecting data around the user and his surroundings and when this data can be shared, it will be suspicious if it's not. And when all can be tracked, we will demand transparency. This heightened visibility will lead to a rise in ratings. Every brand we consider will have a score. And we will have more scores — sustainability scores, skill scores, stress scores, sense of humor scores.



Customization - Jobs, homes, healthcare and devices will aggregate data across sources for better, customized recommendations and outcomes. This will increase the demand of customization of products to even the most minute needs of the user. This era of options marks the end of standardized experiences. Endless customizability implies and invites participation and self-expression. Standard will simply be the starting point as we increasingly craft our own world through control, customization and creation.



Instant Gratification - As computers get more and more efficient and predictive, they will know what their users need before the user. Leading to the user to expect instant results and proactive computation.

24_{hrs}

The time it took the Chinese company WinSun to 3D print 10 houses in 2014.

30_{min}

The time it takes, at 5G speeds, to download the entire Simpsons series (600 HD episodes).



Crowd-sourcing - Users will trust diverse opinions over the individual expert. We see this already with easy access to synthesized knowledge. CrowdMed, Wonder, Kaggle, InnoCentive, Pass The Idea, and countless other digital-age crowd-sourcing platforms democratize expertise in even the most sophisticated topic areas. [10]

Vision

“Empower every person and every organization on the planet to achieve more.”

Products / Microsoft . Near Future

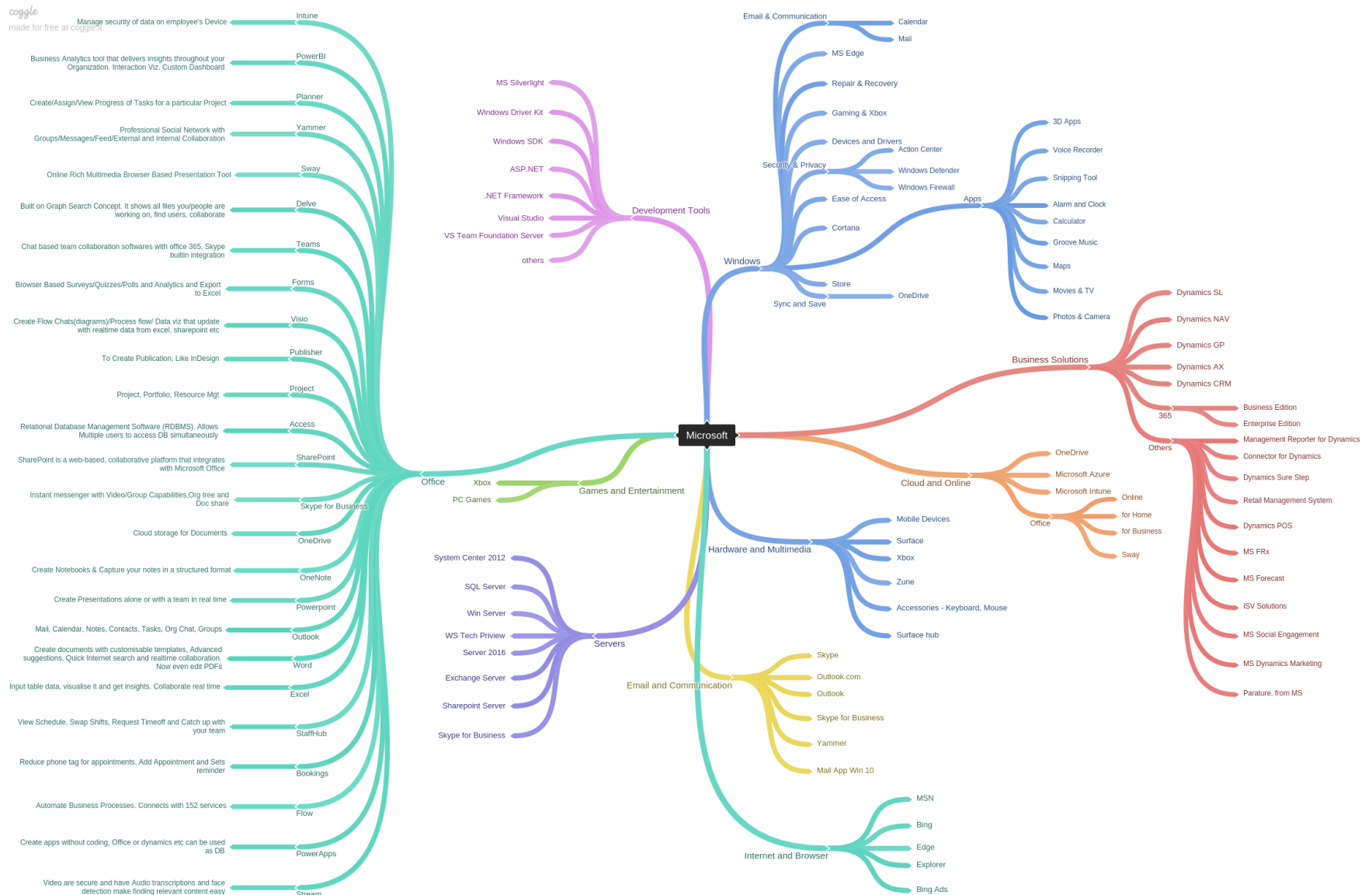


Fig 5. Understanding the Microsoft ecosystem

Microsoft Graph

/ Near Future

Microsoft Graph is the gateway to data and intelligence in Microsoft 365. Microsoft Graph provides a unified programmability model that you can use to take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10

What's in the Graph?

Microsoft Graph connects all the resources across these services using relationships. For example, a user can be connected to a group through a `memberOf` relationship, and to another user through a `manager` relationship. An app can traverse these relationships to access these connected resources and perform actions on them through the API.

A user can also get valuable insights and intelligence about the data from Microsoft Graph. For example, you can get the popular files trending around a particular user, or get the most relevant people around a user.

What can you do with Microsoft Graph?

Microsoft Graph can be used to build experiences around the user's unique context to help them be more productive. For example:

- Looks at your next meeting and helps you prepare for it by providing profile information for attendees, including their job titles and who they work with, as well as information about the latest documents and projects they're working on.

- Scans your calendar, and suggests the best times for the next team meeting.
- Fetches the latest sales projection chart from an Excel file in your OneDrive and lets you update the forecast in real time, all from your phone.
- Subscribes to changes in your calendar, sends you an alert when you're spending too much time in meetings, and provides recommendations for the ones you can miss or delegate based on how relevant the attendees are to you.
- Helps you sort out personal and work information on your phone; for example, by categorizing pictures that should go to your personal OneDrive and business receipts that should go to your OneDrive for Business. [11]

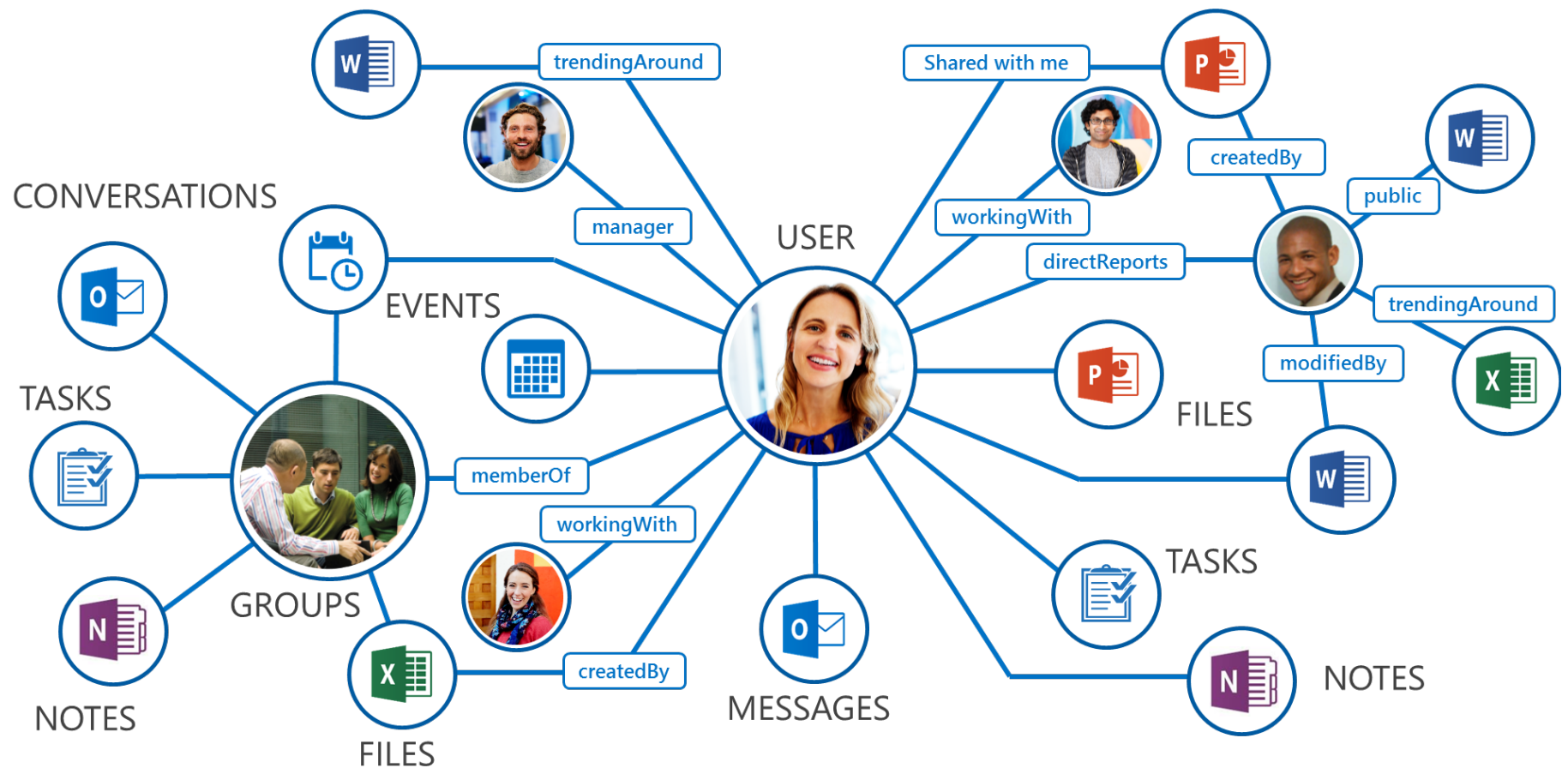


Fig 6. Microsoft graph - made up of resources (files) connected by relationships (b/w members)

Graph Support

/ Near Future

The graph currently supports very few of Microsoft products. But we assume that in the near future, more and more of the applications will be accessible to graph to get rich contextual data of the user.

The ones we know



The lesser known



Business grade

[BETA]

[BETA]

Others



Fig 7. Microsoft products supported by Graph

Graph Data Example / Near Future

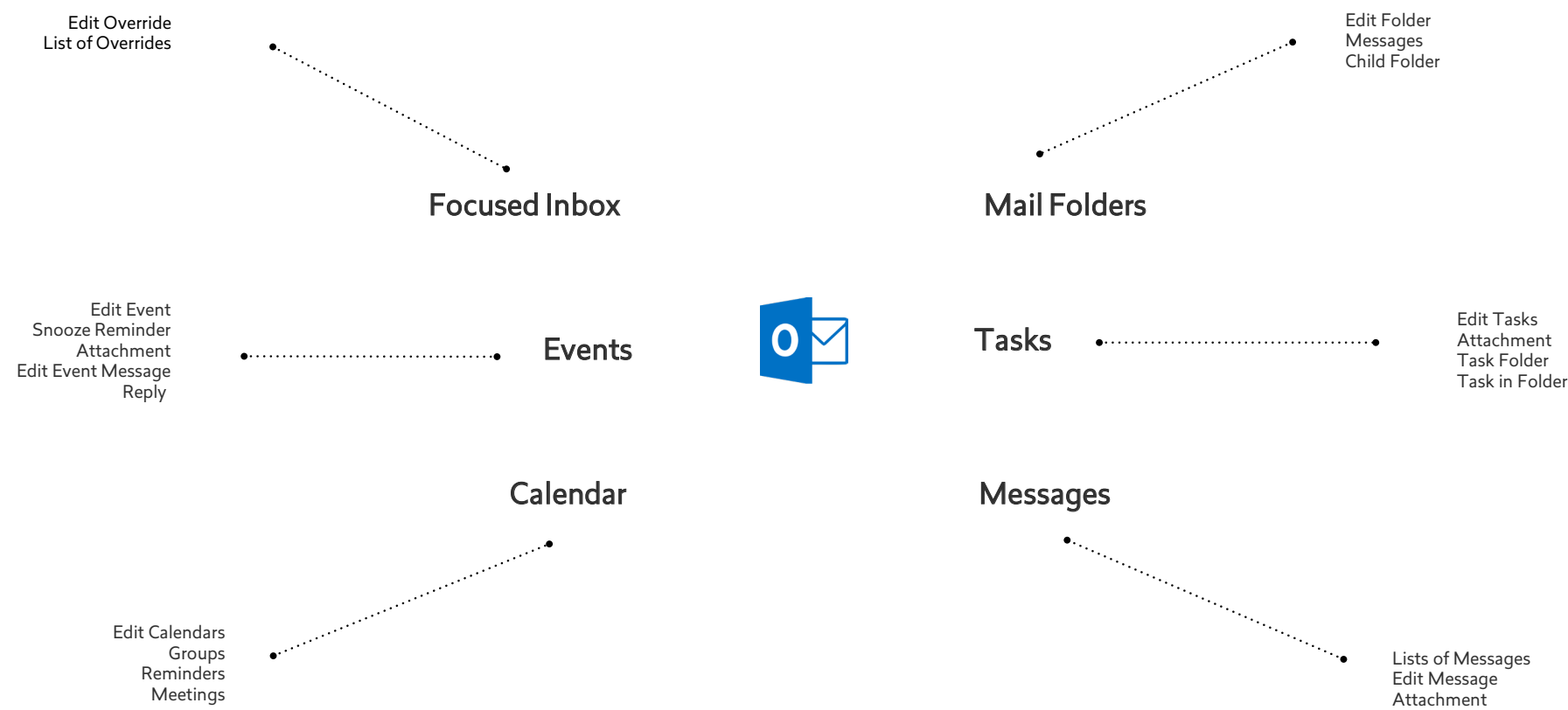


Fig 8. Data example from outlook

Vision

“To create a digital Economic Graph of the world.”

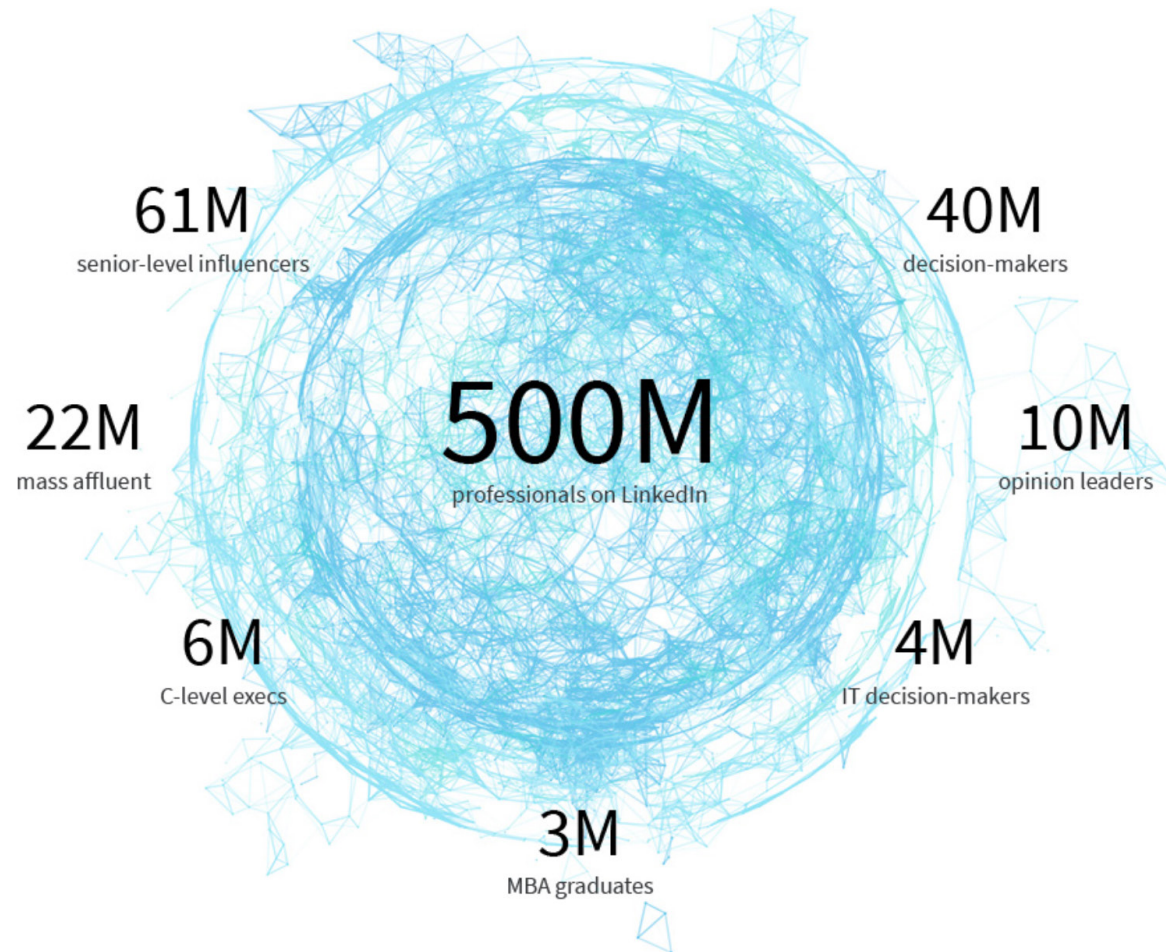


Fig 9. LinkedIn boasts of a pool of decision makers on its platform

LinkedIn Offerings / Near Future

LinkedIn is a business and employment-oriented service that operates via websites and mobile apps.

It has two types of offering

1. General user offering - These are products that the mass consumer, Jobs, Profile page, Groups, Pulse news etc.
2. Business offering - LinkedIn offers variety of products for businesses to help with the entire business pipeline, from hiring solutions to sales insights.

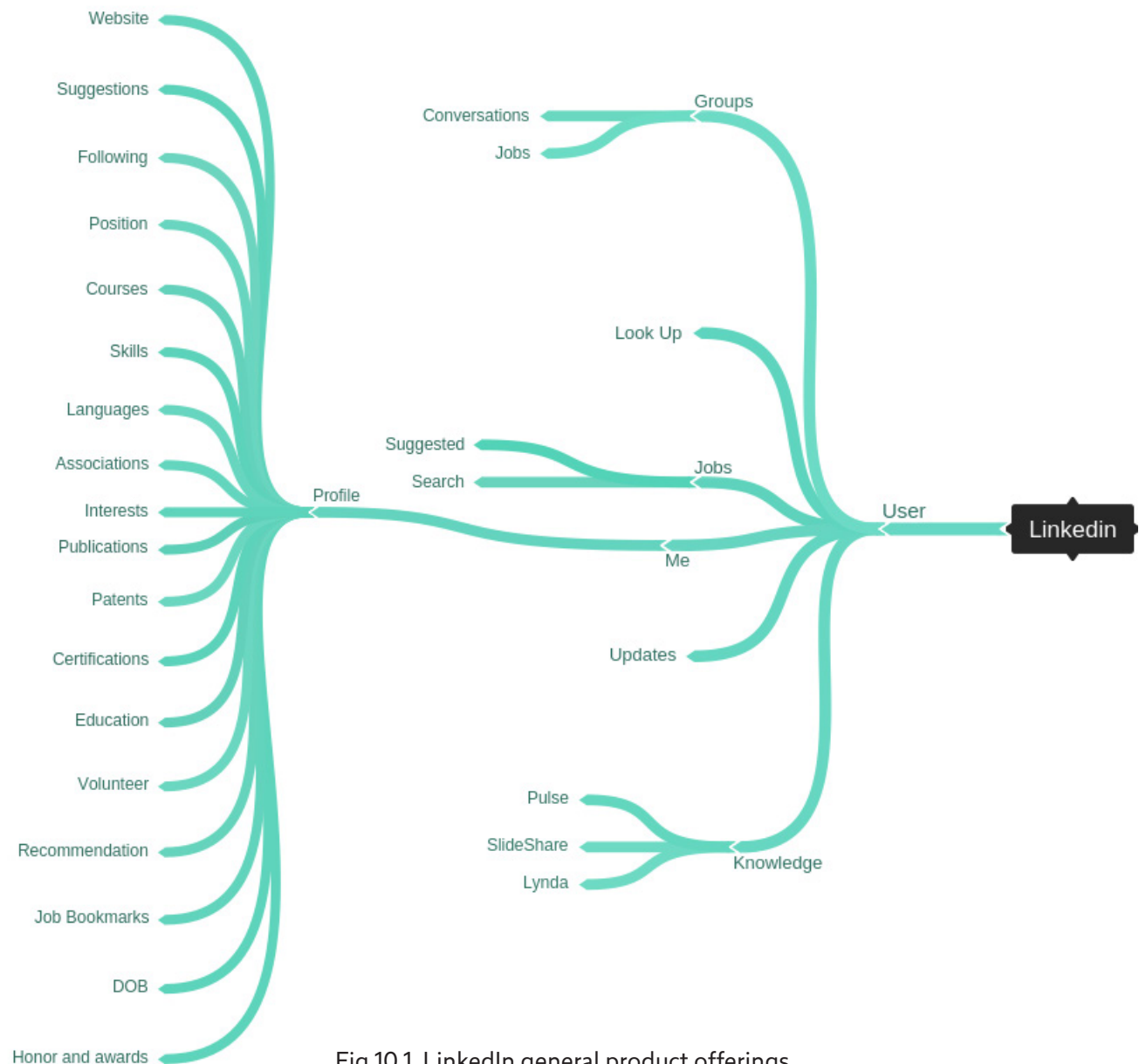


Fig 10.1. LinkedIn general product offerings

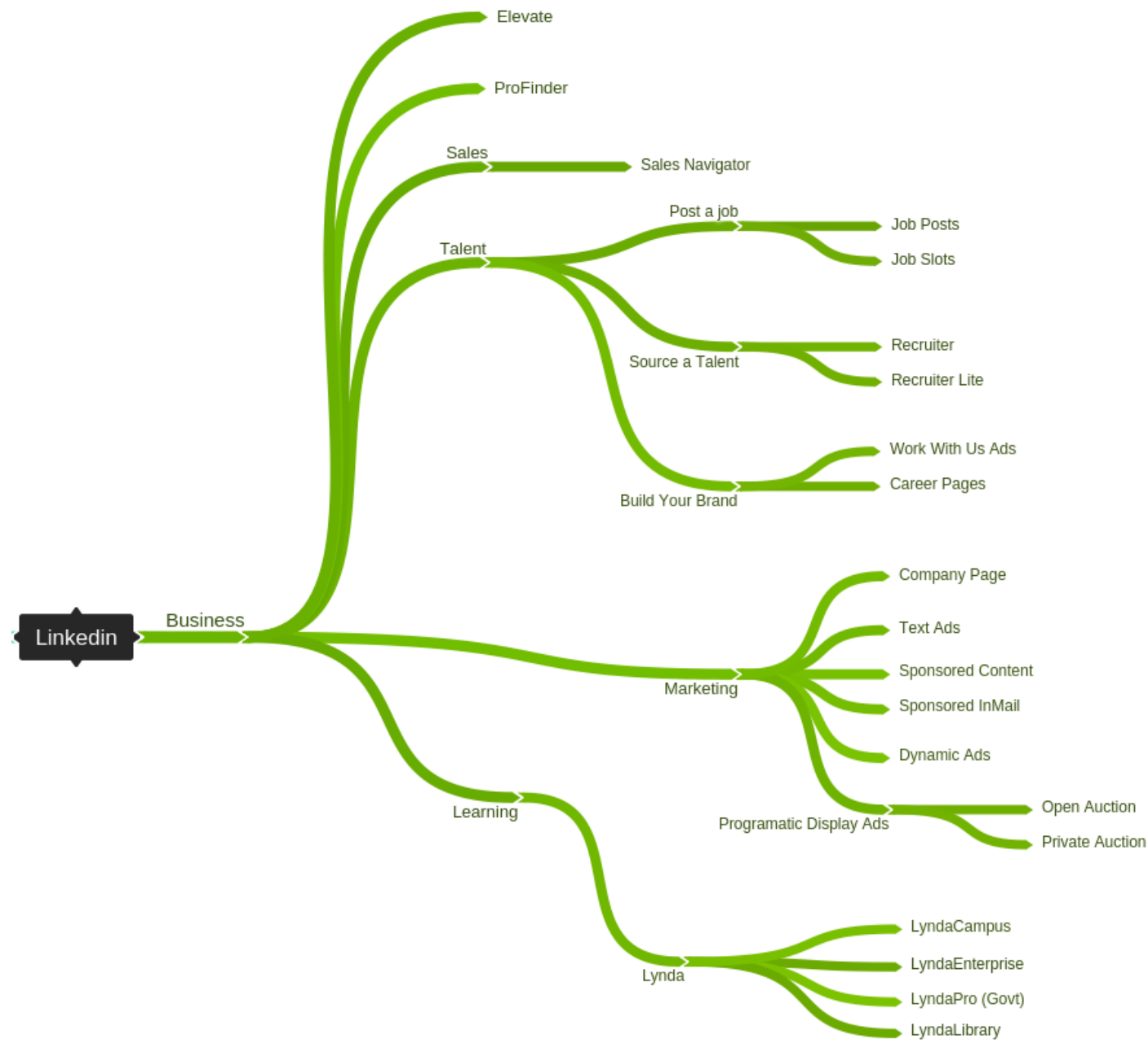


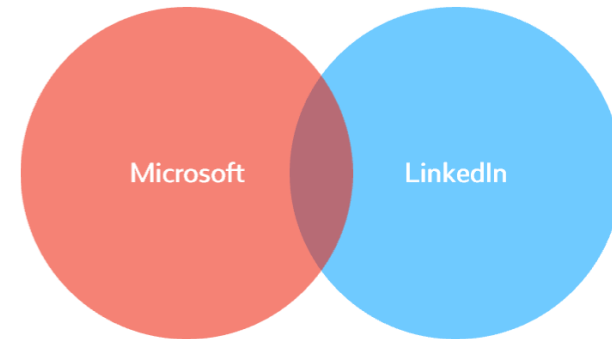
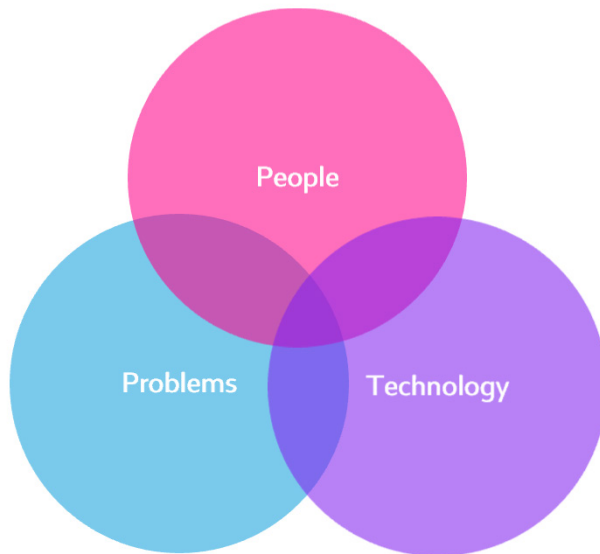
Fig 10.2. LinkedIn business product offerings

Summary

/ Secondary Research



Secondary Research covered the problems faced by agents both sales and service both with CRM systems and everyday, the next generation of workforce and what their behavior is going to be and what technologies are going to become main stream in the near future.



Secondary research also covered how people, agent problems and technology are going to adapt to one another and how Microsoft which gives internal insights of your organization and LinkedIn external to your organization giving a full 360 view.

Secondary Research Insights

/ Secondary Research



Seamless UX - Omni channel view is not enough, for a more richer experience all channels must give a unified context aware experience.



Customization - Hyper customization of software according the user's behavior need and usage. Allowing software to adapt to the user instead of the other way round.



Crowdsourcing - Leverage crowd sourced data wherever possible.



Agent 360 - Business should also focus on how they can leverage rich data around the agent to understand their strengths and weaknesses and tailor make improvement plans so they can grow, improve and provide better service to the customers.



Proactive Care - Solve problems before they occur, understand patterns, customize to each customer and/or smart reminders so agents dont forget their promises to the customers.



New Ways of Reporting - Getting rid of AHT and CSAT scores as KPIs and use CES score to predict loyalty of a customer to the brand.



Automated Data Entry - Eliminate manual entry process so the agents can focus on what they do best. Saving time, effort and improving accuracy of the data in CRM systems.



Improve Self Service - The new ways of tech-savvy customers try to solve the issue on their own. Improving discovery, data, search and consumption of these portals will save billions of dollars of the businesses



Improve Transparency - Collect data responsibly, and be upfront about where this data is being used and for what. Keeping the user updated and informed would improve trust and perception of the business.



Actionable Insights - Not just deriving insights from data but also providing the user with the next best action to take. Improving efficiency and reducing ambiguity will get a lot more done within the same time frame, Improving the efficiency of the business

Primary Research

Sales questionnaire	44
Mobile case studies (sales)	52
Sales insights	58
Service questionnaire	67
Mobile case studies (service)	74
Service insights	78
Final insights	87

Sales Questionnaire

/ Secondary Research



1/3 Hate CRM - Low adoption rate. It doesn't help them sell - in fact it hinders in the process

What do they hate in CRM?

Why do they use it then?

What do they like?



5.5h/w Data entry - Just entering activities and contacts instead of selling.

Tools to improve productivity?

What features do they want?



Too Many Competitors - Low adoption rate. It doesn't help them sell - in fact it hinders in the process

How do you keep track?

What info is most important?



9% Data Accuracy - Data is incomplete, outdated or inaccurate. Reps put little effort into entering data

Why don't they update?

What info do they need most?

How do they keep track?



Long Timeline - The will the client finally come on-board uncertainty and how to keep them engaged during long timelines

How do you assess a prospect?

How do you keep in touch?



Long Timeline - The will the client finally come on-board uncertainty and how to keep them engaged during long timelines

What research do you do?

Where do you search?

How do you get in touch?



Training - While joining the company and after a mistake is made?

While joining?

What if you don't hit the target?



Process - Ideal process vs practical process

Pre, Engagement, Post?

How different teams work together?

Communication with the client?



Mobile Features - What features do they need and aspire for

Features required?

Interview Number :

Greet : Thanks for taking out time from your schedule! I really appreciate it!

Permission : Do you mind if I audio record this session?

Background : I am currently working for the dynamic 365 team and we are primarily focusing on sales and service. So my brief is to understand daily problems faced by agents and to look at how we can leverage Microsoft products to solve the same.

----- **Demographics** -----

1.Name :

2.Education Background:

3.Designation :

4.Experience :

5.Industry :

6.Product/Service that you sell:

7.Type of Sales:

8.CRM :

9.Tool Used:

----- General -----

1. Why sales? Why this career path? What excites you? - Understand the daily driving force?
2. Team structure and work flow?
3. How does your typical day look like? - Understand daily routine

----- Process & Tools -----

----- Pre Sales -----

1. How and where [Tools] does a lead come into your pipeline?
2. How many leads are usually in your pipeline? How do you manage them?
3. How much information do you have about the lead when it arrives?
4. How do you collect information about them [Tools used]? How much time dedicated to this?
5. What information according to you is most necessary about your lead? Before approaching

----- Sales Engagement -----

1. After qualification how do you approach a prospect? [Tools used to track info]
2. Modes of communication with the prospect you use?
3. Preferred mode and why?
4. Do you store the communication anywhere [Tools]? If yes, How, where and why?
5. How do you follow up with the prospect? Different ways used?

----- Post Sales -----

1. Why did a customer buy or not buy what are the reasons according to you? What makes or breaks a sale?
2. How do you track progress [Tools]? Metrics used?
3. Post sales communication?
4. How do you manage between multiple tools?
5. What happens if you miss the sales target? How do you cope up? [Metrics | Trainings]

----- **CRM Specific [Ask in between tools section if CRM is a tool used]** -----

1. Have you used a CRM system ?
2. What are the different processes you performed on a CRM system?
3. Why did you use it? Primary use?
4. Difficulty faced using the CRM system on a daily basis?

----- **Training** -----

1. What kind of training did you have to go through before starting on the job?
2. Did you feel confident post training to handle sales?
3. What if you don't hit your target what happens?

----- **CRM of the Future** -----

1. What features would you want in a CRM system?
2. Would a mobile tool help? If yes, Features?
3. To sum it all up - What are the main pain points of sales according to you?

CRM Future

- 1.What features would you want in a CRM system?
- 2.Would a mobile tool help? If yes, Features?
- 3.To sum it all up - What are the main pain points of sales according to you?

MISC

- 1.Anything that I missed out on?
- 2.How can I improve this questionnaire?
- 3.Refer some friend for a F2F interview?

Introduction:

This short survey is about **you!** Tell us your unique sales **process, tools** you use to accomplish your daily tasks and the **problems** you face along the way. For once we are trying to focus on the real face of the company - You.

1. What type of sales do you perform? [Multiple Choice]

- 1. Inside
- 2. Field

2. What part of sales process do you come in? [Multiple Choice]

- 1. Presales
- 2. Engagement
- 3. Post Sales

3. What problems do you face on a daily basis selling? [Large Text Box]

4. What softwares do you work on everyday? [Large Text Box]

5. A mobile app is being developed for sales agents just like you. You are in charge what features would you add? [Large Text Box]

6. What is your name? [Small Text Box]

7. Where do you work? [Small Text Box]

Sales Interview

/ Secondary Research

253



LinkedIn - Sales agents/managers requested for over the phone interview

11



OTP Interviews - Conducted for the participant who agreed and recorded each session

23



Surveys - For participants uncomfortable with OTP

0



Quora - Everyday problems faced by sales agents? - open ended

Mobile Case Studies

/ Primary Research

Babar Khan



Field Sales | Oppo Mobiles

Babar is a field sales manager - He goes out to different locations each day puts up an oppo stall and tries to make as many handset sales as he can. He works remotely and hardly goes to office

During the interview process, there were a few participants that relied on a mobile for their daily office tasks.



Babar only uses WeChat to communicate with his team and leads.

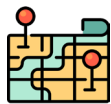
Updates them with his achieved sales targets at EOD on the same.

Receives Reports and next day location also via WeChat

Day in a Life of Babar

/ Primary Research

8:30 PM



Gets Tomorrows
Location



Update Leads about
Reached Target

7:30 PM



8:30 AM



Carries Inventory &
Makes Sales



Gets Reporting &
Metrics within 30 min

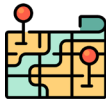
8:00 PM



6:30 PM



Collects Competitors
Sales from Sangeeta



Receives Tomorrows
Location

8:30 PM

Mobile Case Studies

/ Primary Research

Kalki Rao



Field Sales | Zomato

As a sales manager in a fast-paced startup, Kalki sells Ad spaces in the Zomato app. He is tasked to get restaurants on board Zomato and becomes a one-point contact for that account.

During the interview process, there were a few participants that relied on a mobile for their daily office tasks.



Kalki scouts for any new restaurants in his designated area.

He travels to the location and tries to get them onboard Zomato.

Creates a WhatsApp group with all decision makers and helps out with any issues that occur thereafter.

Day in a Life of Kalki

/ Primary Research

8:30 AM



Checks on the dashboard if there are any new restaurants in his area



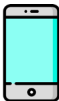
Makes a WhatsApp group with all stakeholders of the restaurant for quick MOMs and issue resolutions.

12:20 PM

8:45 AM



WhatsApps his teammates asking if anyone is pursuing that restaurant already



Uses mobile app cupcake to view his pipeline and update status

12:30 PM

11:12 AM



Travels to the restaurant & persuades them to come on board.



Restaurant call in for an issue, makes a case, presents & tries to retain the account

3:30 PM

CRM : Dynamics - Use the web version

Complaints about Dynamics:

1. Ultra slow
2. Bad error handling - Search for products - no smart in the text box
3. For an account - I want to create a subsidiary opportunity **know if this is possible** by using dynamics - input save and again

Team Structure:

Microsoft Services Team - 6 sellers called account executives generalists and they are not responsible for various products. They're responsible for the entire business of the account.

Sellers are under Account Managers and there are technical experts who come in to explain the technology

Sales process:

5 stages set by MSX.

Lead generation is a random process. The lead comes into pipeline when an account contacts for a need.

- No incentive to update CRM.
- Weekly reminders
- Can the pipeline in CRM doesn't help in closing deals
- Go around and talk to people who have worked with the account before
- Meeting - 1st of month
- CRM entry of new

Prateek Tamang - Sales Dev Rep - Pre Sales - H

Set up meeting - qualify them - if potential - pass to Bangalore and after POC - warm up to the customer demo go etc.

CRM : ZOHO

Tools : Skype, excel

Info Required

1. Name
2. Designation
3. LinkedIn profile
4. Ph
5. Email

Send an email before cold call so I have something to talk

Look for specific press releases I can talk about in a c

ZOHO advantage:

1. Different teams can be in sync about the sta

To be on the safe side I email the direct seller that info has been updated

Mobile Features:

1. Notification - if there is a very hot lead that came into ZO
2. List of calls for the day

Metrics:

Get more leads - startup culture

CRM, Excel
- Place
- Review
- In-do
- VAP
- Backup reports to save

Meenakshi Sharma - Inside Sales

Product you sell : IT hardware
CRM : Internal CRM (under
Tools : Excel, Outlook

Currently use excel, BANT analysis

I get the list or good.

Reasons

Some are

Main use of CRM
All teams are connect

Everyone has to login in to Attendance for us

Training:

1. Product training

Advantage of CRM:

1. I can see what conversation we have had with
2. It is a proof for us to show manager our work done

Mobile app:

There is a mobile app here in the company but its only for managers. Not for us. Its a kind of chat based tool. They are all connected. To immediately share data.

Features you want on mobile:

1. Basic details : accounts, name, who to contact
2. Mini version of CRM. Not as big CRM desktop.

Yatra | Flipkart - Inside/field Sales

CRM : Salesforce

In flipkart - vouchers - needed to validate companies of spam used to arrive in salesforce.

To verify the company - we ask for - PAN card of the etc.

Also used to cold call HRs for vouchers. Searching on linkedIn (name and number)

65 calls in a day and could convert only 3-4.

2 - 3 min about the company, their product and their requirement

Problems you face in sales:

1. Cold calling without relevant data
2. Rescheduling meetings

The reason for not converting - already tied up with competitors. Why change? Discounts? Then there are companies that have policies not to take vouchers.

Yes, research about competitors through partners and colleagues.

I have a list of companies I want to call in excel. Only once they convert I enter in salesforce.

At yatra we don't use CRM. Just excel. No attachment of files. I historical data.

Problem
- Cold calling without
- Rescheduling meetings
- Research about company
- Metrics tracked
- Manager
- Deal size

Kaiki Rao - Sales Manager - Field Sales - Zom

Sells Zomato app ad space.

Look at newly opened restaurant on the app. Tap Zomato dashboard. Confirm on WhatsApp if any not.

Zomato Dashboard :

1. What particular app slot are you selling to the customer
2. Renewals and contracts is coming up or not.
3. Call tracks with the client

In google we used salesforce - used it basically to find if we are reaching our target or not. 50 leads per day. Filtering and segregating was easy to get leads to contact.

Disadvantage - Did not have an app - people are on the move

Zomato cupcake -

1. Show us how we are doing in the sales grid.
2. Renewals which we have
3. Meetings
4. Managers have access to it
5. The sales grid is for self improvement - shows where I stand
6. After each meeting - update cupcake

3-4 meeting in a day. 50% must be converted.

- Zomato cupcake
- whatsapp
- rescheduling meetings
- is a pain
- Metrics
- revenue s/o
- mobile
- pipeline

Arunjyothi Bhardhan - MetricStream - Head Sales

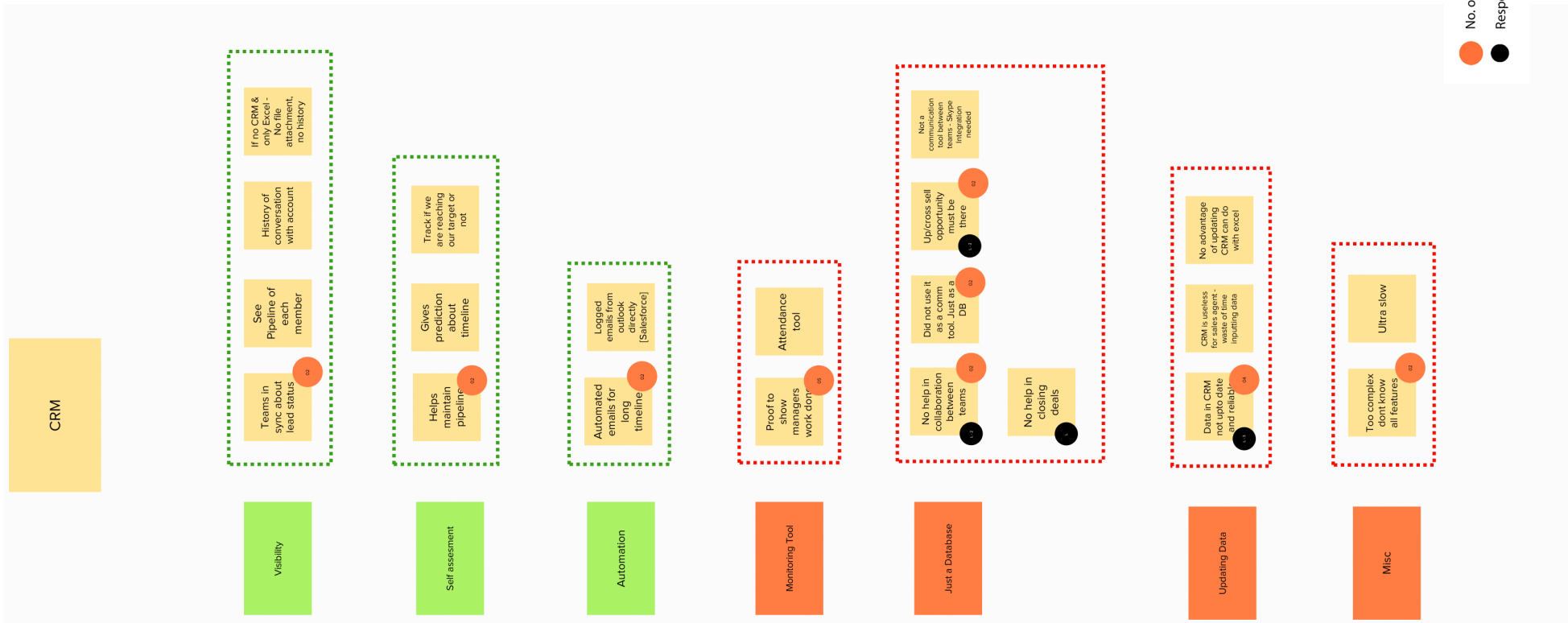
Top 3 problems faced by sales:

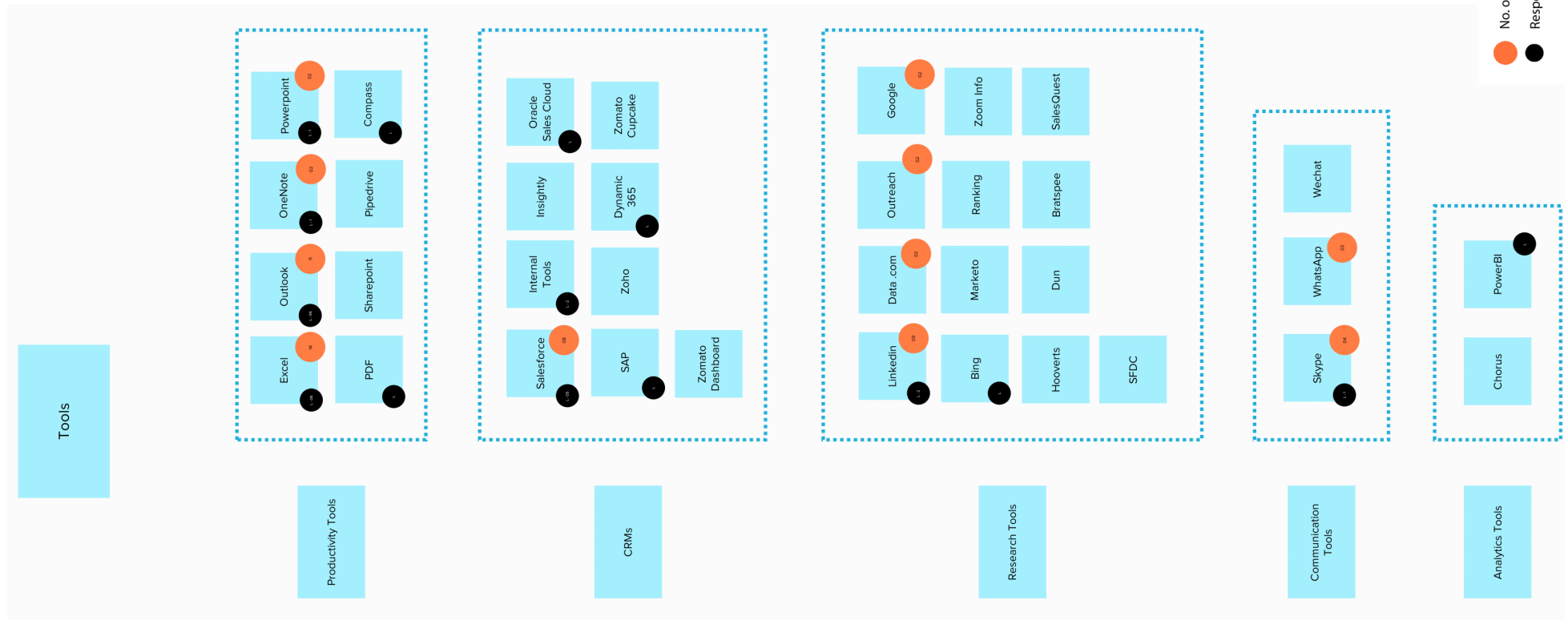
1. Reaching out to C-level - Who is the right person to reach out to? Like me 10 other people are reaching out to him, why should he entertain? Reduces sales cycle drastically
2. Every market behaves differently - APAC, Europe, US - how to position your product - so the challenge is after acquiring a new logo how do you retail them? - what is their motivation - best relationship, pricing, partner service or ..
3. Deal forecasting is the biggest challenge - how do you know if the customer will sign the deal.

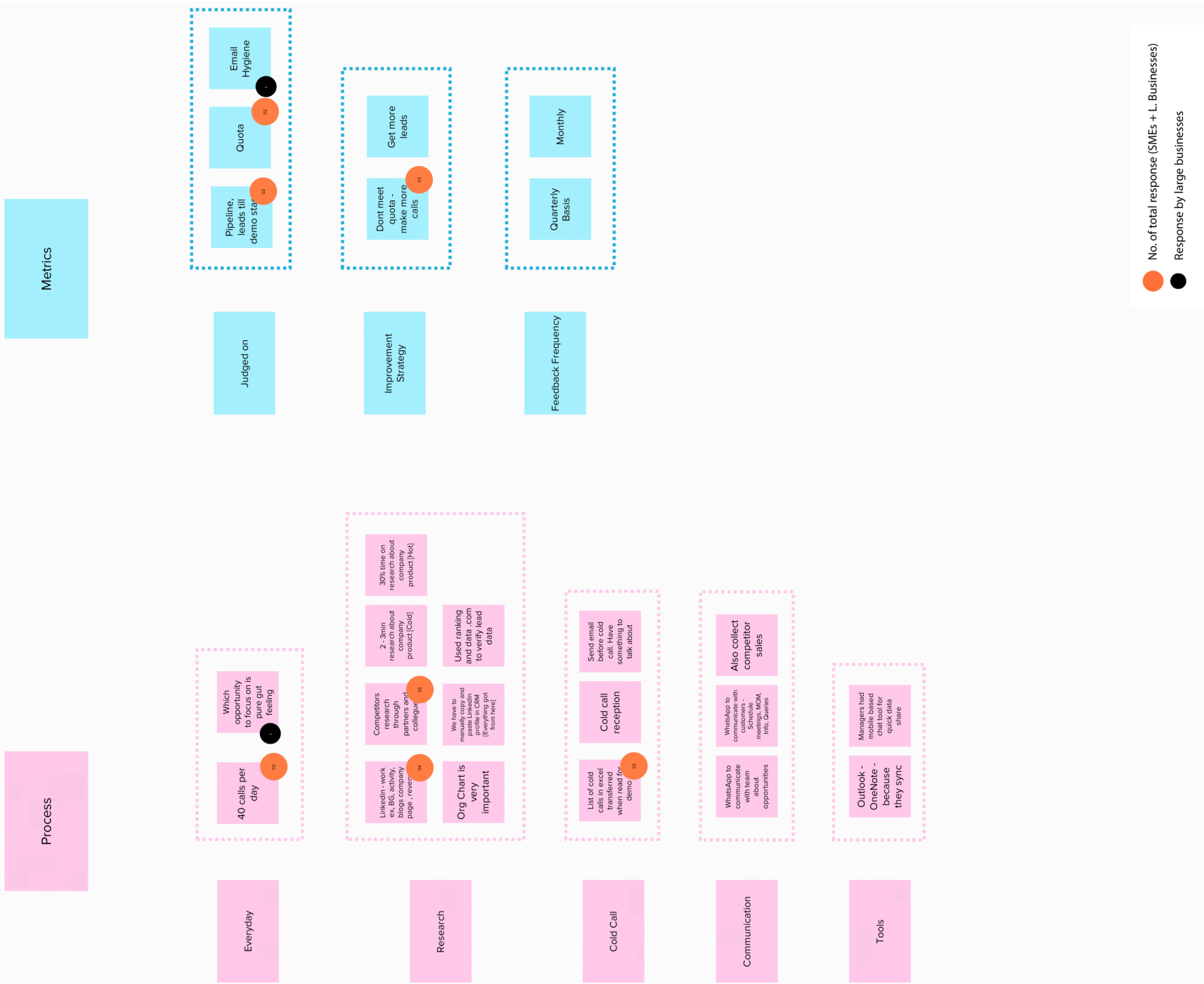
Tools:

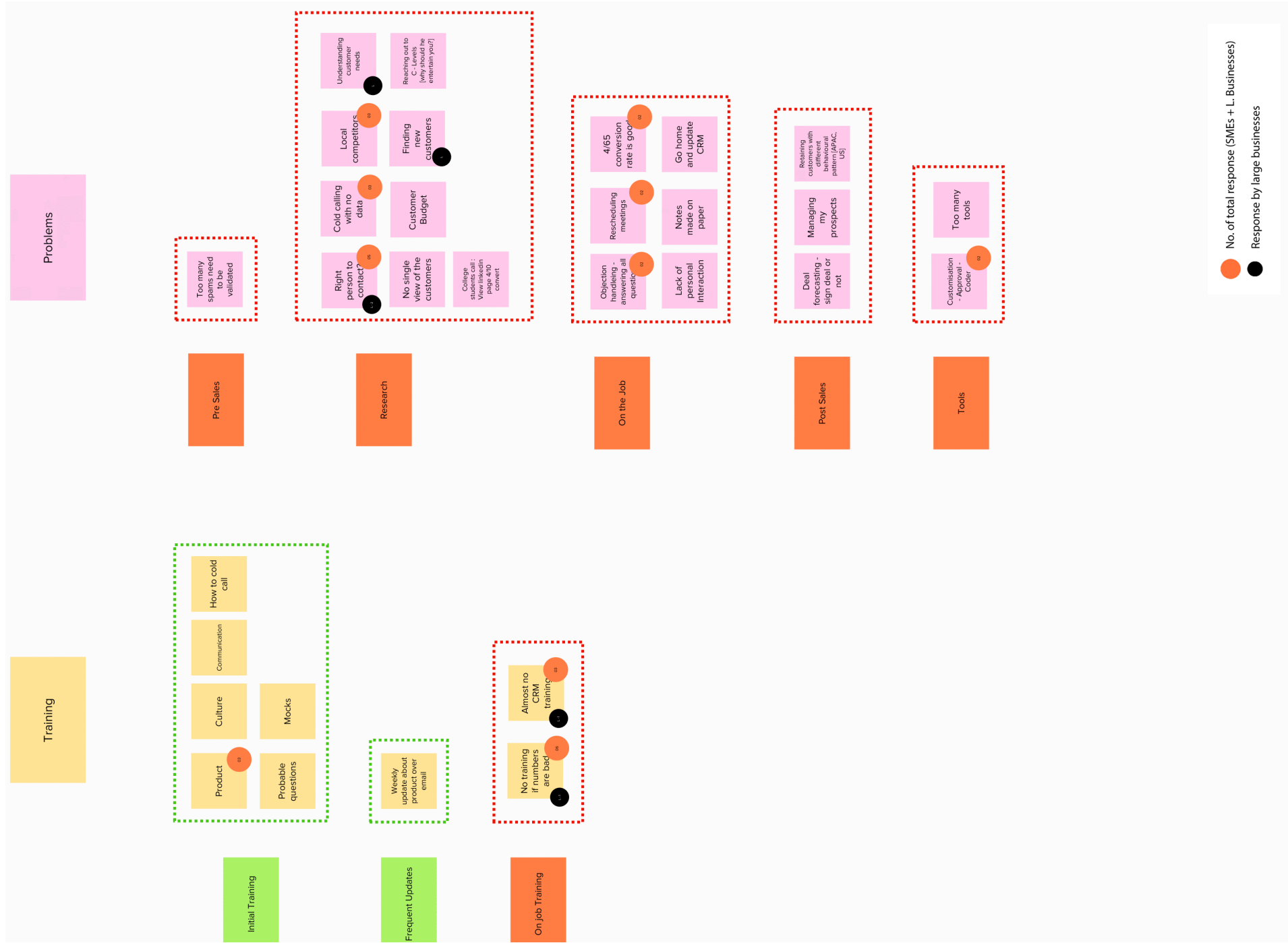
1. Hoovers, Dun and Bratspee company financial details - history, discount history
2. Social media tools to understand tech footprint - salesforce.com, data.com
3. LinkedIn, Jigsaw
4. Salesquest - battle card - gives account info - org chart - very imp!
5. LinkedIn Advantage - These days all C-level people are connected to other C-levels in the same domain, who can make you reachout to whom
6. 30% of the time is invested in a week to do research - info collected through google, cold calling, partners
7. Partners will let you know what are the competitors selling to your account

Sales Insights







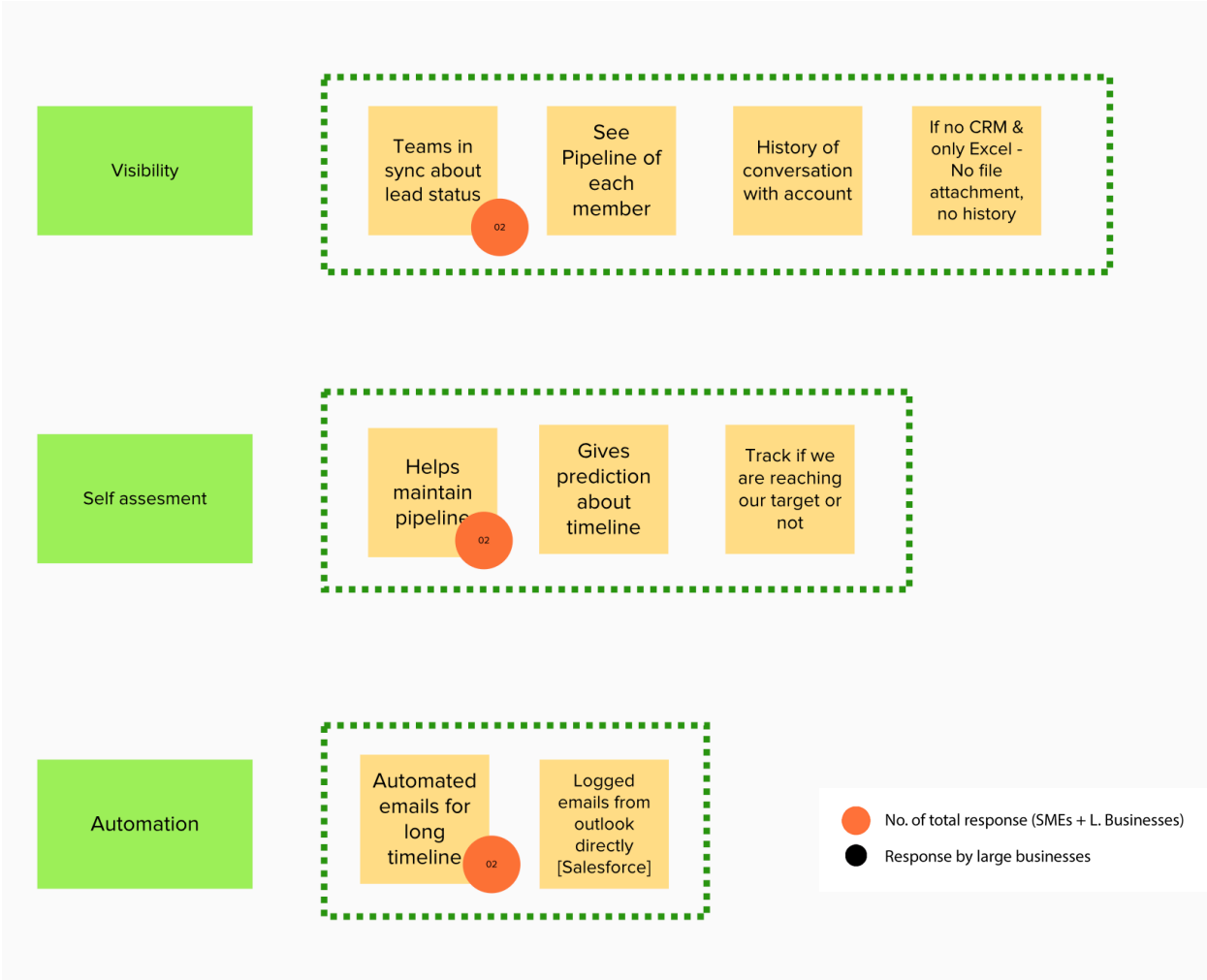


Sales Insights Breakdown

/ Primary Research

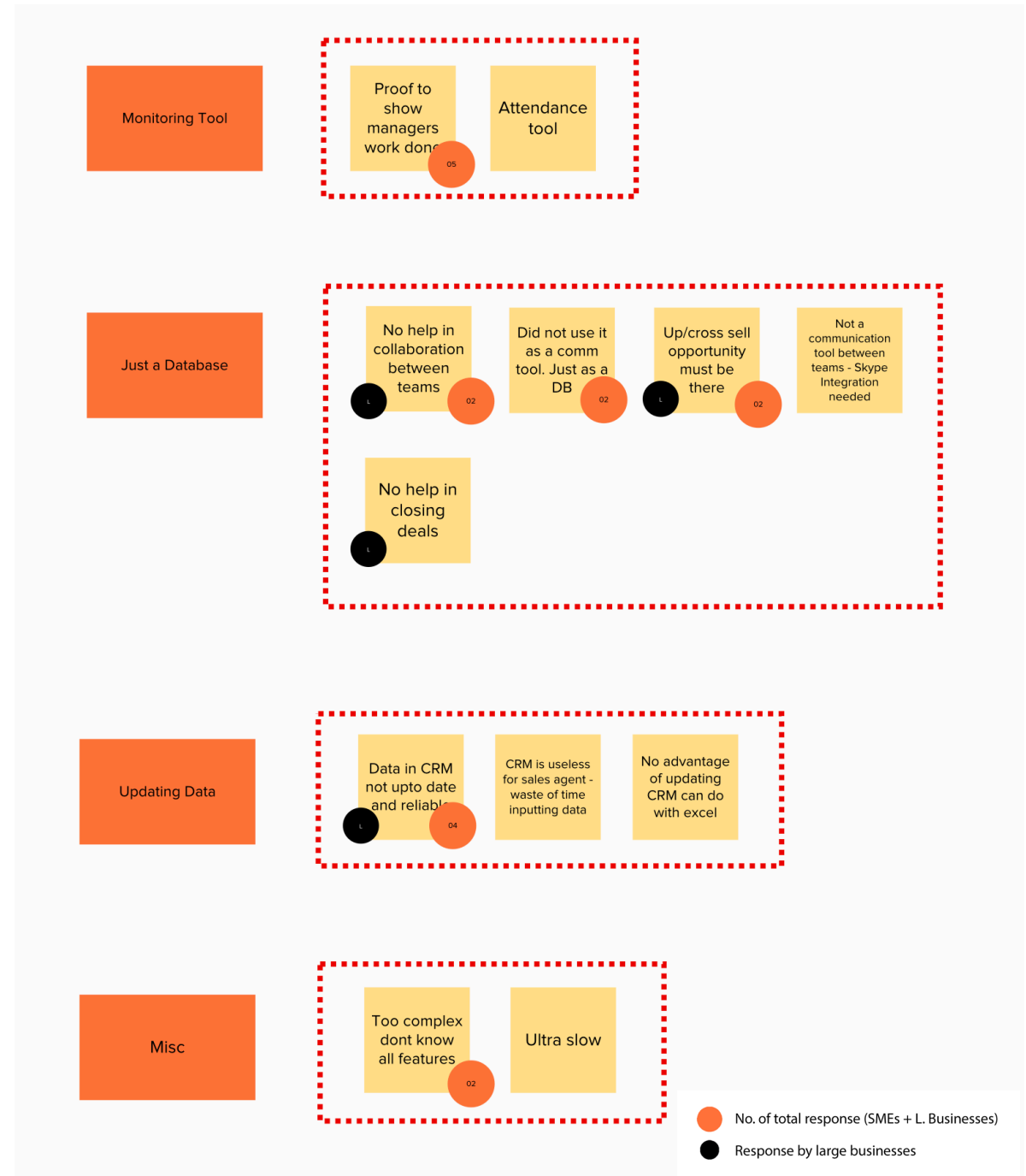


CRM Positives - Sales agents hate CRM. But it must still have some positive aspects that the sales reps use each day to be more and more productive.



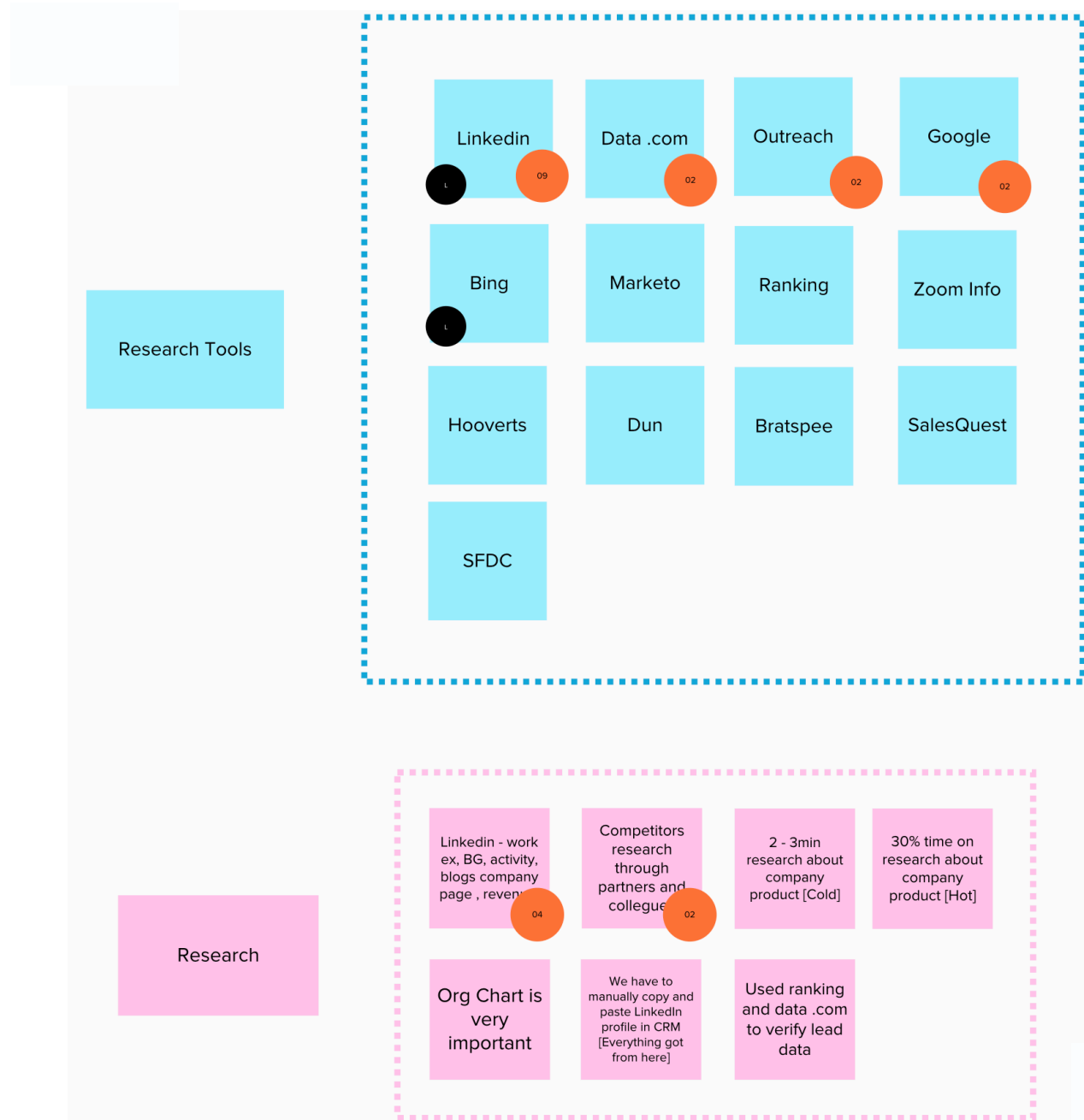


CRM Negatives-Understanding what is the difference between large business and SMEs in usage and difficulties faced



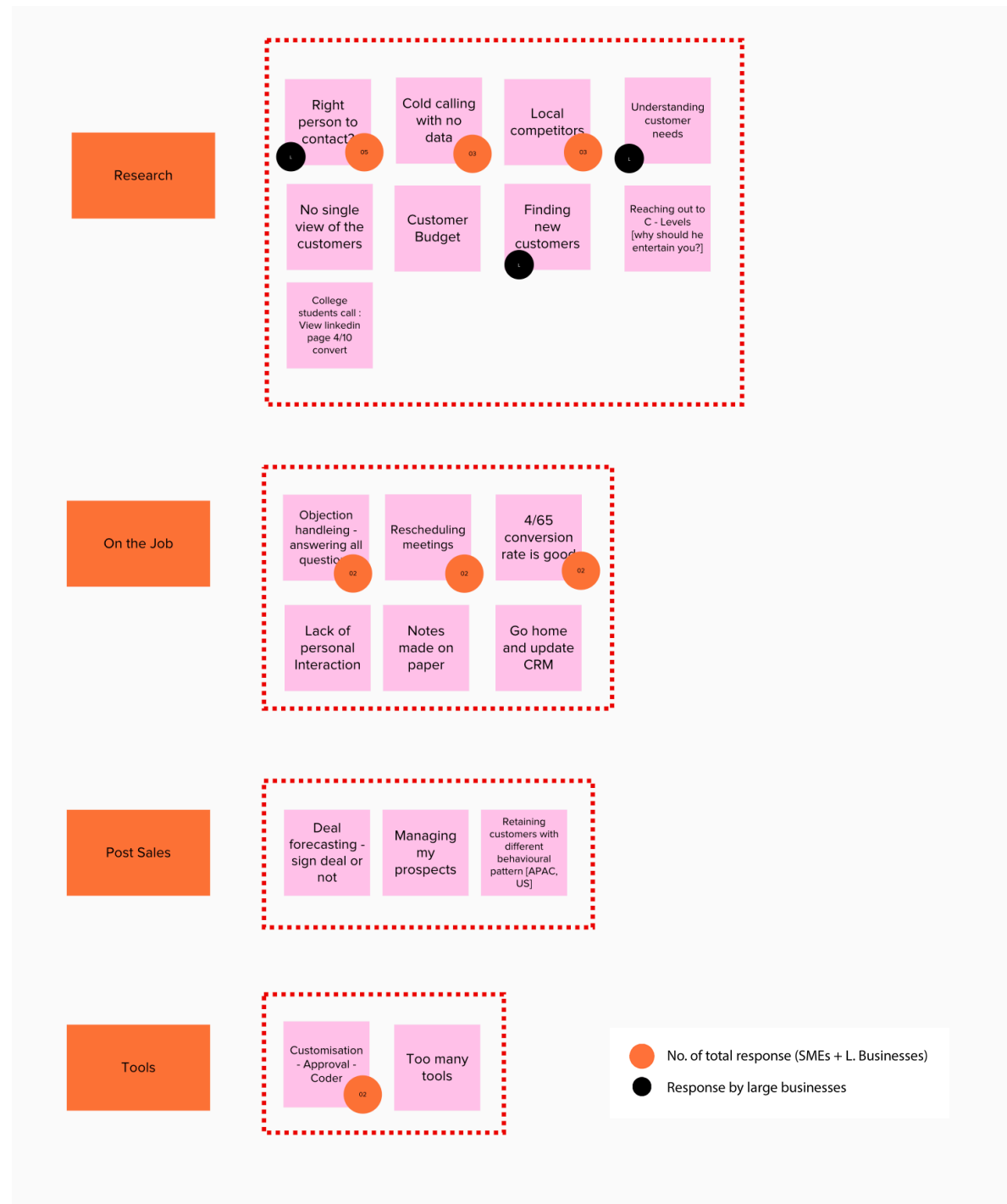


Research Tools - LinkedIn is the most widely used across industries to better understand their client - work ex, blog posts, contact details, other decision makers



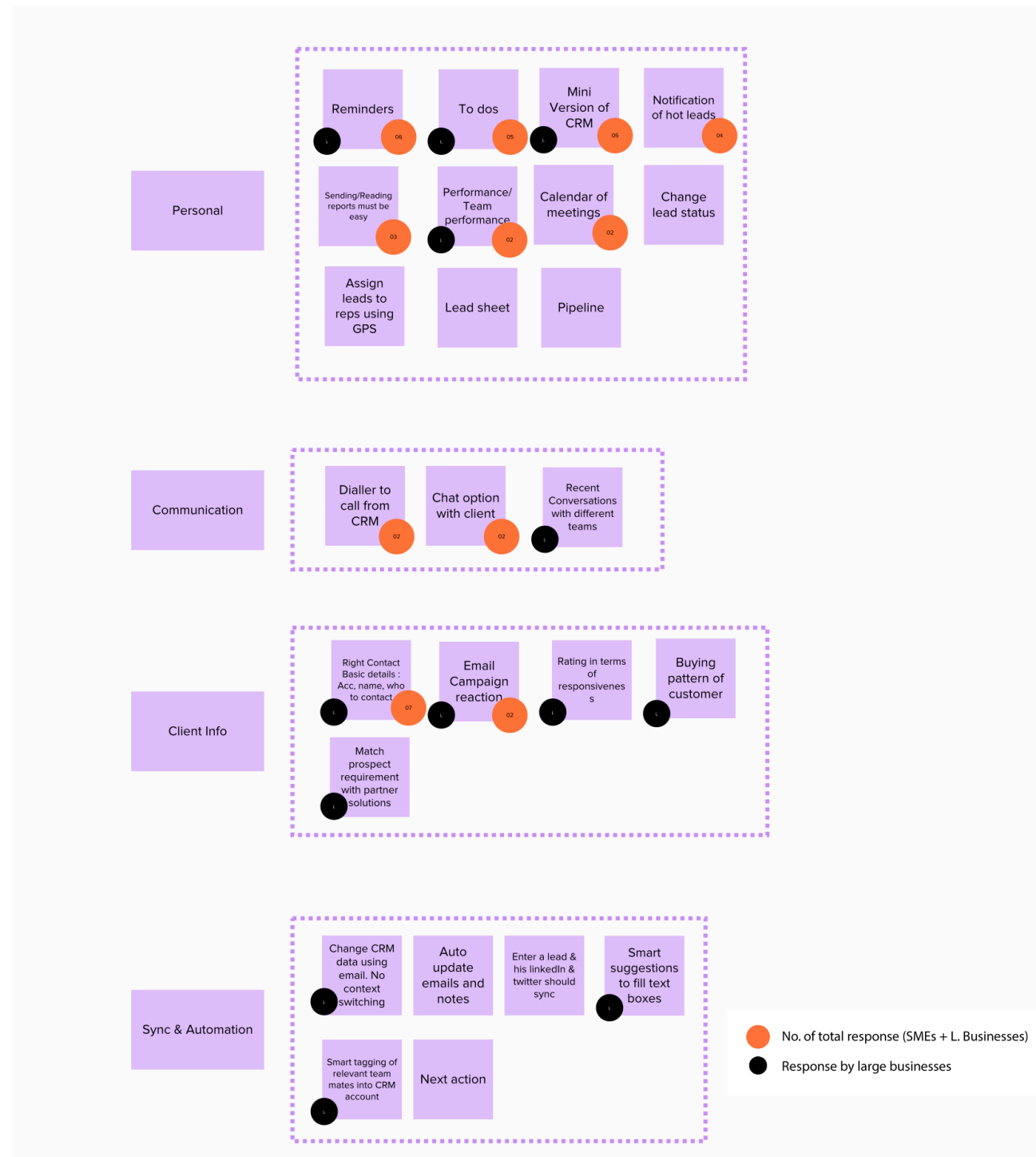


Everyday Problems - What are some of the everyday problems that the agents face on a daily basis?



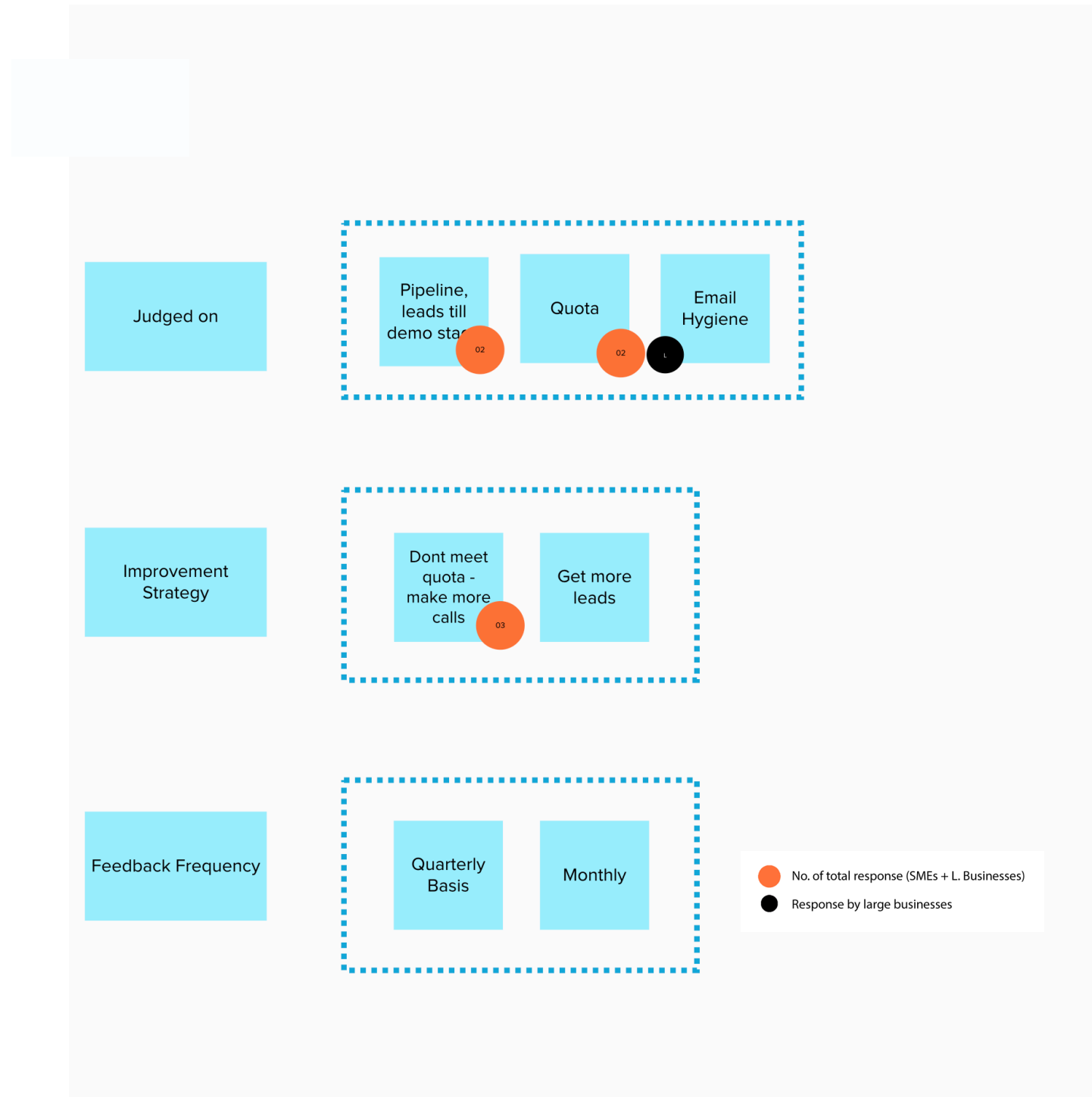


Mobile Features - Reminders , Notification and To-Do lists topped the feature list. Agents ready to trade features for functionality.





Metrics Tracked - All of the agents received feedback on their sales quota, if the quotas were not met more leads were handed to the agent.



Service Questionnaire

/ Primary Research



Days to Generate Report

- Data is not entered, reports take time to generate.

How do you get feedback?

What is the improvement plan?



Legacy ways of Reporting

- AHT instead of CES to better predict loyalty

What is tracked around you?

When do you get reports?

What would you like to track?



Channel Switching - More and more users switch channel making it necessary to have a unified experience across channels

How do you multitask?

Communication between teams?

What channels do you prefer and why?



Handling Angry Customers

- How should an agent handle a customer who is furious?

What is the worst call you had?

Biggest fear?

Advice to new agents?



Overuse of Scripts

- Efficiency and seamless UX vs being more human and empathetic.

How much script do you use?

Advantage?



Unexpected Issues

- Constant fear of issues that might be out of agents scope

How do you handle?

Who do ask for help? How?

Communication between different teams?

How often is the customer informed?



Training - While joining the company and after a mistake is made?

While joining?

What if you don't hit the target?



Process - Ideal process vs practical process

What channels do you support?

Before/during/after service process?

What is being tracked?



Mobile Features - What features do they need and aspire for

Features required?

Interview Number :

Greet : Thanks for taking out time from your schedule! I really appreciate it!

Permission : Do you mind if I audio record this session?

Background : I am currently working for the dynamic 365 team and we are primarily focusing on sales and service. So my brief is to understand daily problems faced by agents and to look at how we can leverage Microsoft products to solve the same.

----- **Demographics** -----

1.Name :

2.Education Background:

3.Designation :

4.Experience :

5.Industry :

6.Shift Timings:

7.CRM :

8.Tool Used:

-----General-----

1. What does your typical day look like?

-----Training-----

1. What training before starting into your job? [**Difficulties** faced during training]
2. What is your team size?
3. What is your org structure?

----- Process -----

1. What does your typical day look like? [**Difficulties** faced during the day]
2. How many issues do you resolve per day?
3. What channels do you support?
4. What channel do you prefer and why?
5. How is an issue routed to you?

6. What information do you have about the customer before the call/chat/email? [**Difficulties** faced with the customer]
7. What information would you like to have before the call/chat/email?
8. Where do you gather this information from?
9. What is the general mood the user when they call? And how do you handle it?
10. Do you use a standard script/ canned messages? Why? And where?
11. Have you added your own things to script and messages? If yes what? And how?
12. How long did it take to by-heart the script? [**Difficulties** faced]
13. Where do you find the resolution of the problem? Tool? Time? [**Difficulties** faced]
14. What if you can't find the resolution? What do you do?
15. What is the AHT? What problems do you face with it?
16. What work arounds have you used to stay within AHT?
17. Post resolution what do you do? Update ticket? Do you update anywhere else? [**Difficulties** faced]

- 18.How much time between 2 calls/chat?[**Difficulties** faced]
- 19.Where do you store tasks completed in the day?
- 20.Do you take customer feedback and how?
- 21.Communication between team? [**Difficulties** faced]
- 22.What are the kind of metrics/monitor tracked around you?
- 23.How is this informed to you?
- 24.How do you improve? [**Difficulties** faced]
- 25.I'm sure you are good at what you do but if you had to name one thing you want to improve about yourself w.r.t work?
- 26.What would you like to track about your work?
- 27.What kind of users would you like to interact with?
- 28.If we are building a new application for customer support, what info would you like to have?
- 29.What advice would you give a new CSR?

1. What channels do you support? [Multiple Choice]

1. Phone

2. Chat

3. Email

4. Social

5. Other

2. What softwares do you use at work and for what? [Large Text Box]

3. What would you like to improve about yourself as an agent? [Large Text Box]

4. A mobile app is being developed for customer service agents just like you. You are incharge
what features would you add? [Large Text Box]

5. What is your name? [Small Text Box]

6. Where do you work? [Small Text Box]

Service Interview

/ Secondary Research

530



LinkedIn - Service agents/managers requested for over the phone interview

19



Surveys - For participants uncomfortable with OTP

10



OTP Interviews - Conducted for the participant who agreed and recorded each session

7



Quora - Everyday problems faced by service agents? - open ended

Mobile Case Studies

/ Primary Research

Megha Gupta



Service Delivery Exec | Oberthur Tech.

Megha's company is into manufacturing of credit and debit cards. She handles accounts such as SBI and she is the one point contact for them.

During the interview process, there were a few participants that relied on a mobile for their daily office tasks.



Megha uses her email as a to do list

She is proactive in contacting her clients even if they aren't facing any issue

Customers contact her on her personal mobile, WhatsApp or any medium they can.

Day in a Life of Megha

/ Primary Research

8:30 AM



Reaches office and Flags
Emails



The Accounts contact on her
personal Email/Phone

12:30 PM

9:20 AM



Look at who hasn't contacted
in a while



They try to reach to her any way
they find fit - Even WhatsApp

1:10 PM

9:45 AM

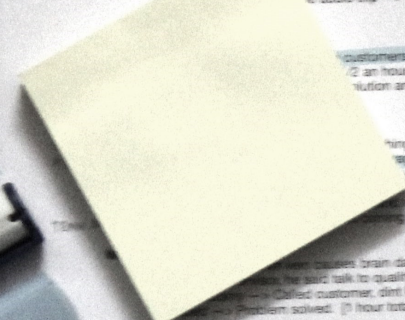
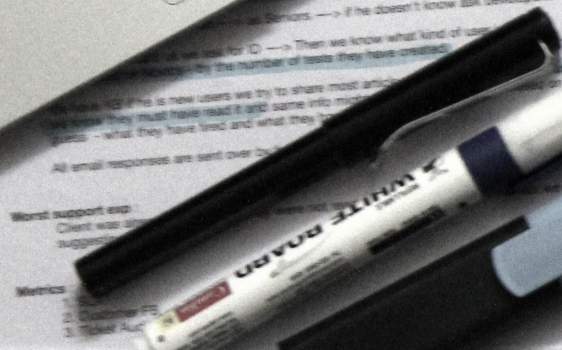


Maintains a diary for her To-
Dos



She gets the right teams involved &
ensures the issue is resolved on time.
Keeping clients updated on the issue status

1:40 PM



RM (Lotus - Email, chat, internal email), Flipkart (Rightnow - Email, Call, inbound calls), Ola (Freshdesk | Anejo for calls | Moved to Zendesk -

that take up co-working space need to be retained, management - improve collaboration - events - gigs, - AIMS credits, travel discounts, hotel booking discounts, people who are building a community - music gigs, art classes etc.

WhatsApp, Emails, Chats, Solution Infinity calls (Chrome extension) (Calls), Google Hangouts, Gmail, Google Hangouts, WhatsApp, Chats (.)

Every month there are town-halls in every city - we go take feedback, complaints and suggestions from here.

Medium : Call, Email, I prefer call - better reaction time

Process : Login to system -> Check Mail (process updates) -> Briefing of 5-10 min -> Work -> Inbound calls

Call Process -> Ask Details -> Fill Google Form (Quality Issue, Replacement) -> audio clip -> Send Form -> Open Ticket.

customers hang out at I/R. We call them back (outbound) 2 an hour - but its a tedious task to read the problem, solution and signature - will take 4-5min better call and

things in excel (did he greet etc), we get an email - management knows it only then -> 1.5-2 hours with manager

ask to each other

Problem :
1. Different software to make calls, emails and raising tickets - 6-7 tabs are open and 2-3 google sheets
2. Every time a customer calls we need to search for details - the moment customer calls details should populate itself - Name - order history etc - cuts down time - When a user

Education: BBM CMS

Work Exp: Myloop - 1 year, Headout - present (2 months)

Current Role: Community engagement - handle customer enquiries

JD - Help customers make reservations to experiences in Dubai, Abu Dhabi, NY, SF - They call book using app or website

Type of Requests: Booking, Voucher not excepted, Experience satisfaction issues

Medium of Requests: Call, chat, text/ sms, App for WiFi

You are responsible for: All of the above

Org Structure: 6 people in team - Report directly to manager

Tier based system: No

Tools used: Login into Zendesk - To receive chats
Sonar - to receive texts
Salesforce Desk - To receive mails from customers/vendors, vouchers
Hotline - customer chat only for iOS users
Excel Sheets - Inventory (tickets available) - updated every 1 or 2 hours
Headout application on laptop - to see cashback requests etc.
User id / pass for each app is different.
Stripe - booking details using credit card last 4 digits.
Slack - for internal team comm. (had a mobile app installed) - different channels - bangalore office - broadway tickets etc.

Tools Where?:
Open in chrome - bookmarked and opens through VPN so ip address for tickets is tracked
Use Pseudo names and fake locations -> 2019-2020

Types of Requests: Escalations, Errors from our end, vendors side or customers side. Esc request is labeled manually

The agents don't bother to see the dashboard say it is for the manager to view and it Don't have access to it

Chat Requests through Zendesk:
We can see people who are active on the website and who are idle and when a user initiates chat the color changes to green and we click and start chatting in the pop

Company Product: autoDesk

Job Role: Monitoring the SLA

Team Size: 18-25

Number of calls: 100/day

Org Structure: CSR -> TL ->

Tools used: Customer service Outlook, Excel

Medium: Emails, Calls

Process:

15 min Hurdle to share outbound calls to the

Our team -> Escalate handle issue within 3 d

Each customer in custo

Outlook for general offic

Put customer on hold to KB articles are updated add into

A few number of steps in recordings and feedback feedback given.

There is Associate Drive based on Nios/ies (Custo

In ACP program each cal promotions

Customer Surveys:
If he is happy no neceess feedback email and send

Metrics:
Nios/ies (Customer Feed
A/N/T (Average Handling
EDR (Expression Disaste

Problems Faced:
1. All are not open to han
2. CSRs sleep in night sh
3. Late login

Faisal Shaikh - Customer Service Advisor - F Source

Company Product: Tata Sky, UK

Job Role : Customer Service Advisor

Description : TL, Broadband, Landline and SmCard - We give a bundle package whe single bill with all details

Tools used : Company tools, Other tool are not allowed; Agent don't have access to TL. We have a chat for team.

What do: Every month there are town-halls in every city - we go take feedback, complaints and suggestions from here.

Medium : Calls

Process : Come half an hour prior -> Briefing 10 min (stats of the team) -> Take call -> After call wrap

We need to be transparent with the customer. He should know what we are doing

Script : Greeting -> paraphrase -> Assurance -> Solution -> Thanks

Problems Faced:
1. Cannot predict call flow.
2. Users have a mindset that we will do anything for them. They think we a
3. We have certain limitation.
4. 30 min 15min 15min Breaks have to be back to least 5 min prior to the it
5. A customer has already called 5 times and now he is furious and come
Survey will affect my score

Stats:
1. A/N/T - 12min is bench mark - 30 calls per day

Quora What problems do customer service agents face on a day to day basis?

Amanda Kennedy, Trainer, Processor and Supervisor at Conduent (2015-present)
Answered Sep 12

Misunderstanding.
Almost all issues that arise out of the correspondence between myself and the customer are simply due to misunderstanding.

It's hard when you're busy with life and have to put that on hold to contact someone you don't really want to only to hear there's further action required on your part after you've already done everything you feel you needed to. (But not necessarily much?)

Every company has different rules/regulations/laws they have to follow.
This means that just because you can change your due date with one company doesn't mean you can change it with another company.

Just because your car payment with one company can be 5 days late without penalty doesn't mean your other car payment with another car company can be the same.

A lot of times, people like to compare apples to oranges. It's unfair, and it happens, but be cautious and try not to become irate if an agent can't do exactly what you ask.

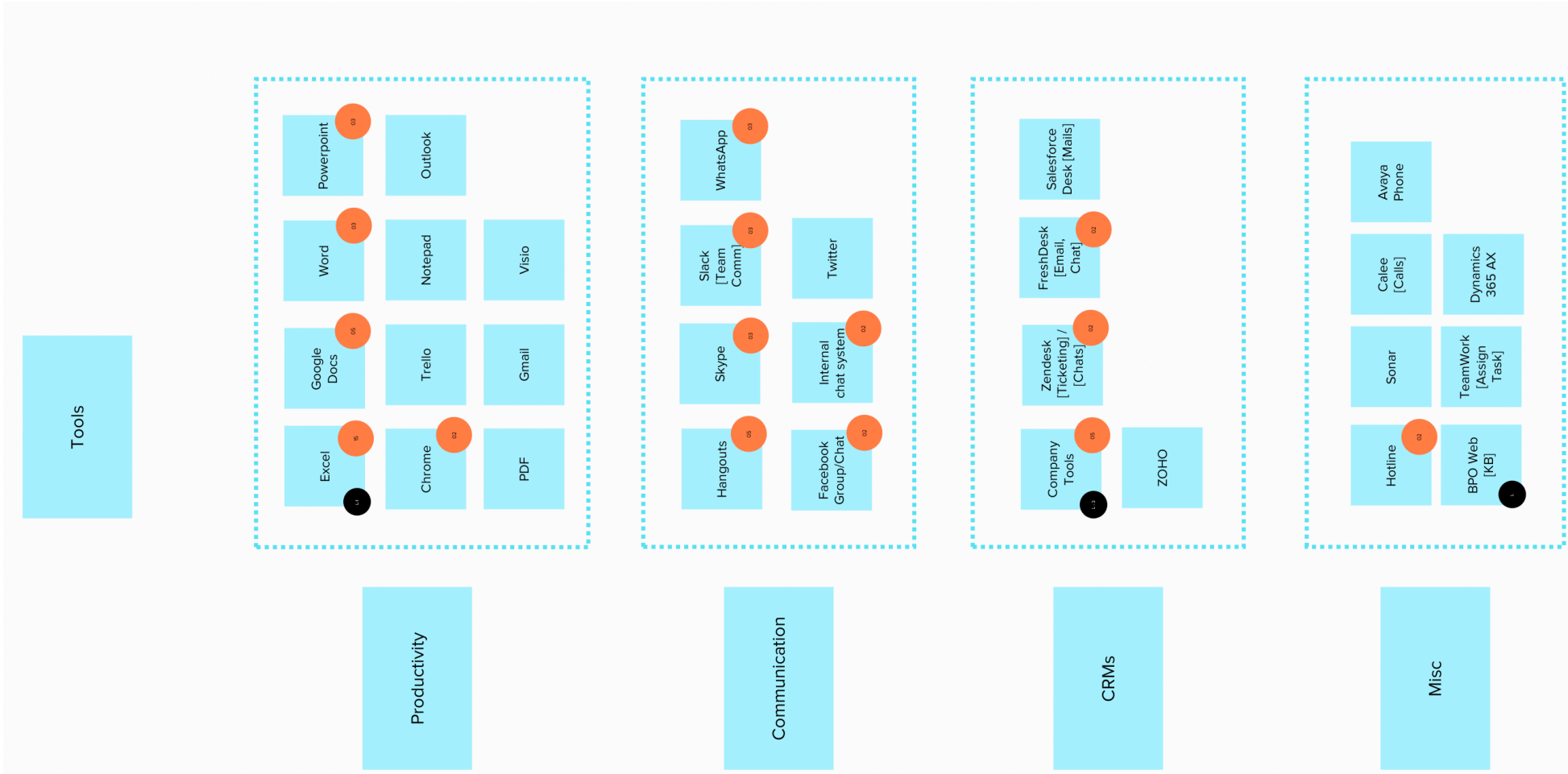
Also, if you feel you are being taken advantage of or not being heard, ask for a supervisor. Typically, agents aren't able to provide the services the supervisor would. Asking for a supervisor eliminates your frustration of having to deal with an agent that cannot give you what you want or need and gets you to the person who can.

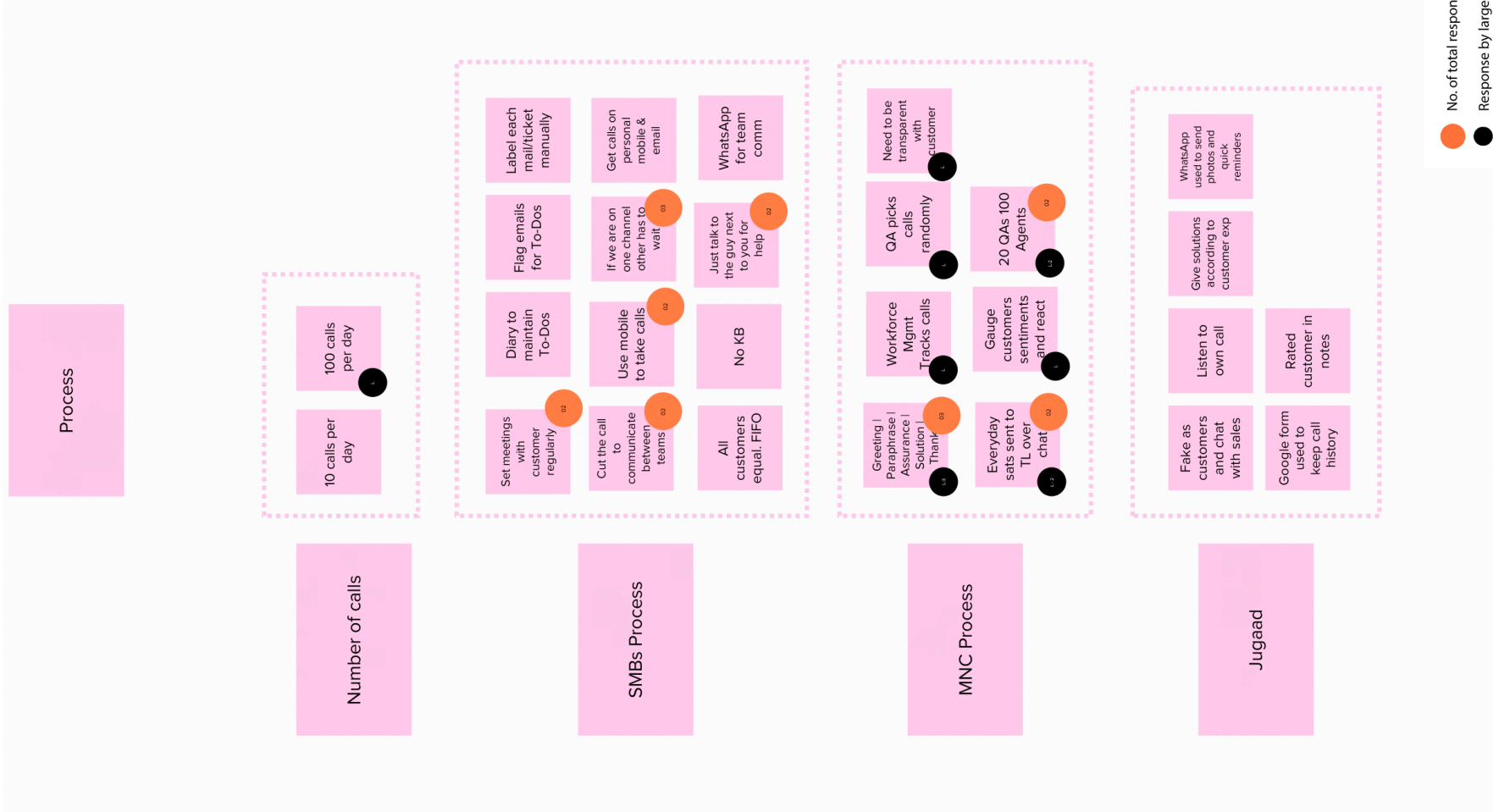
Ujjwal Shrivastava, Technical Content Writer at TIAA (2017-present)
Answered Nov

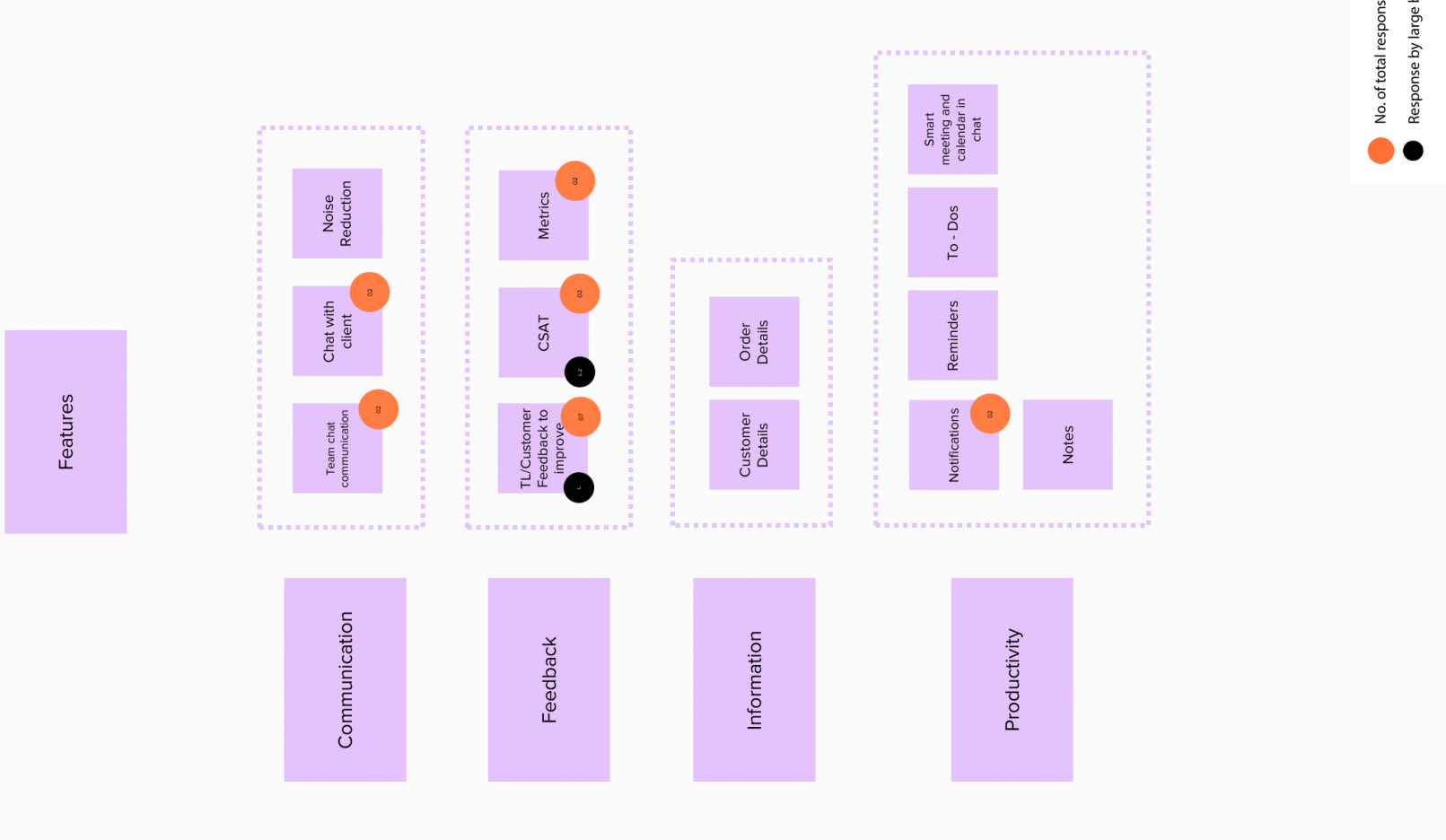
The moment I came across this question, I smiled a little :)
Customer Service Agent's problems.....?

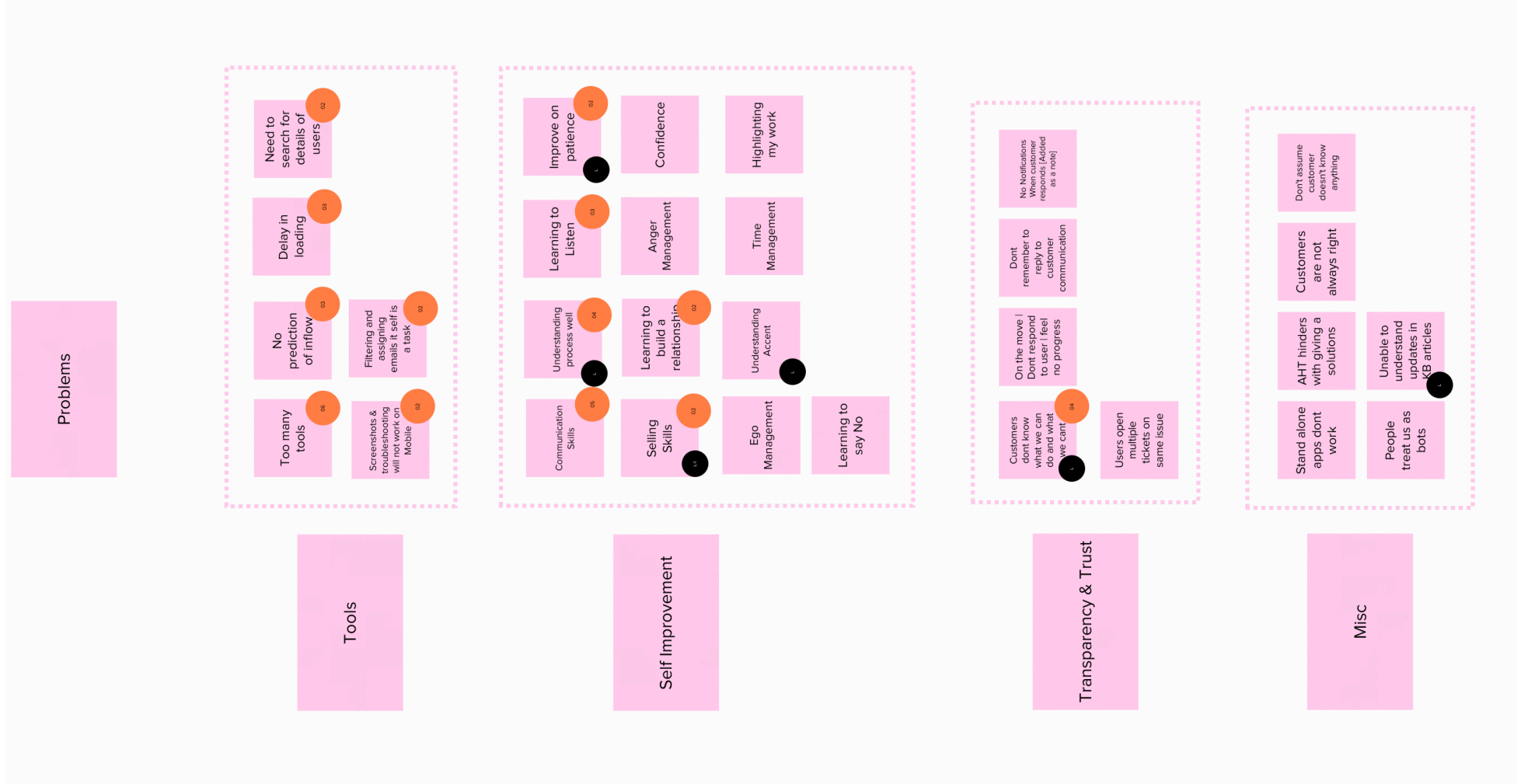
Now, at least some one is actually worried about the support agents.

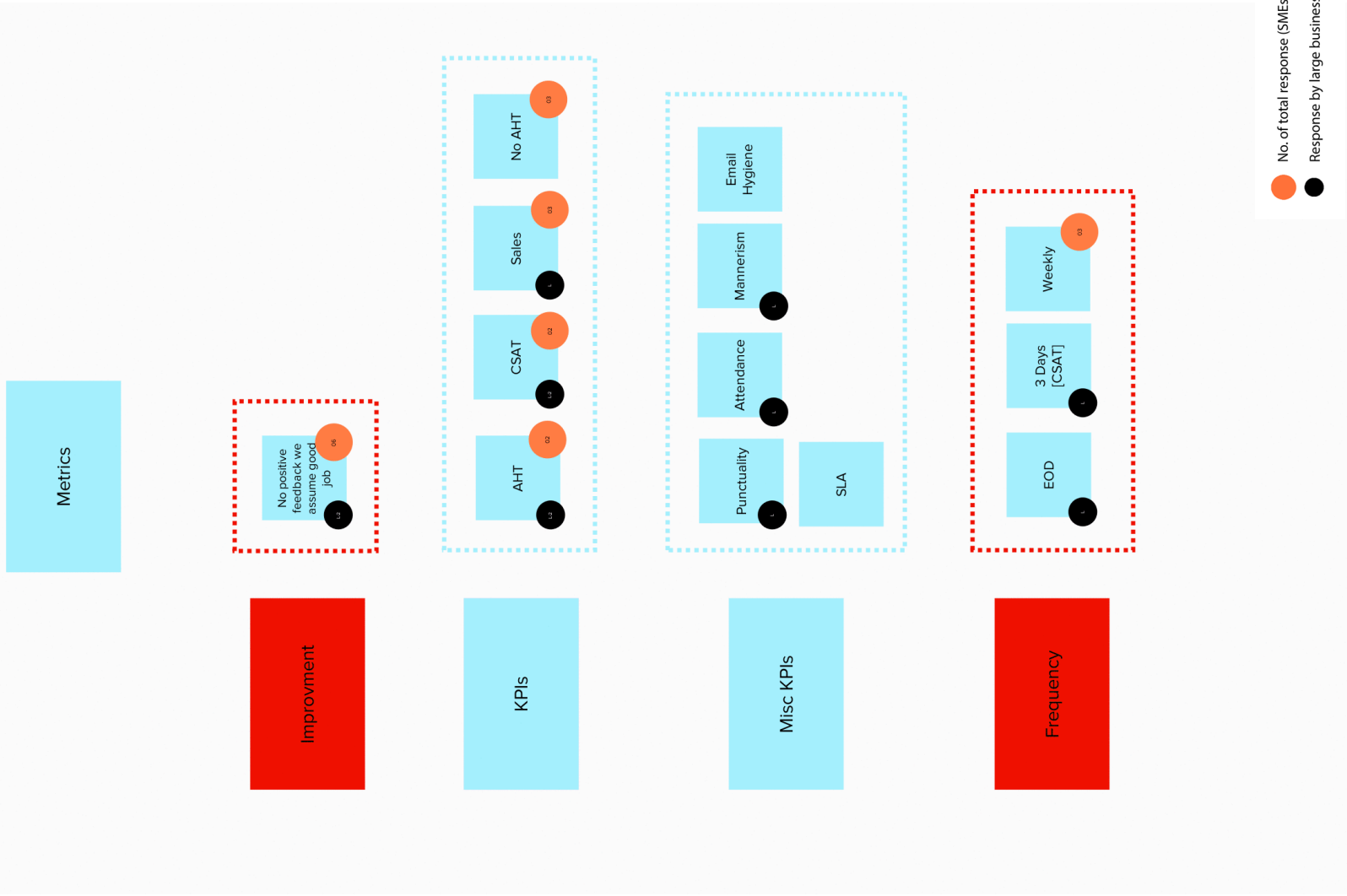
Service Insights

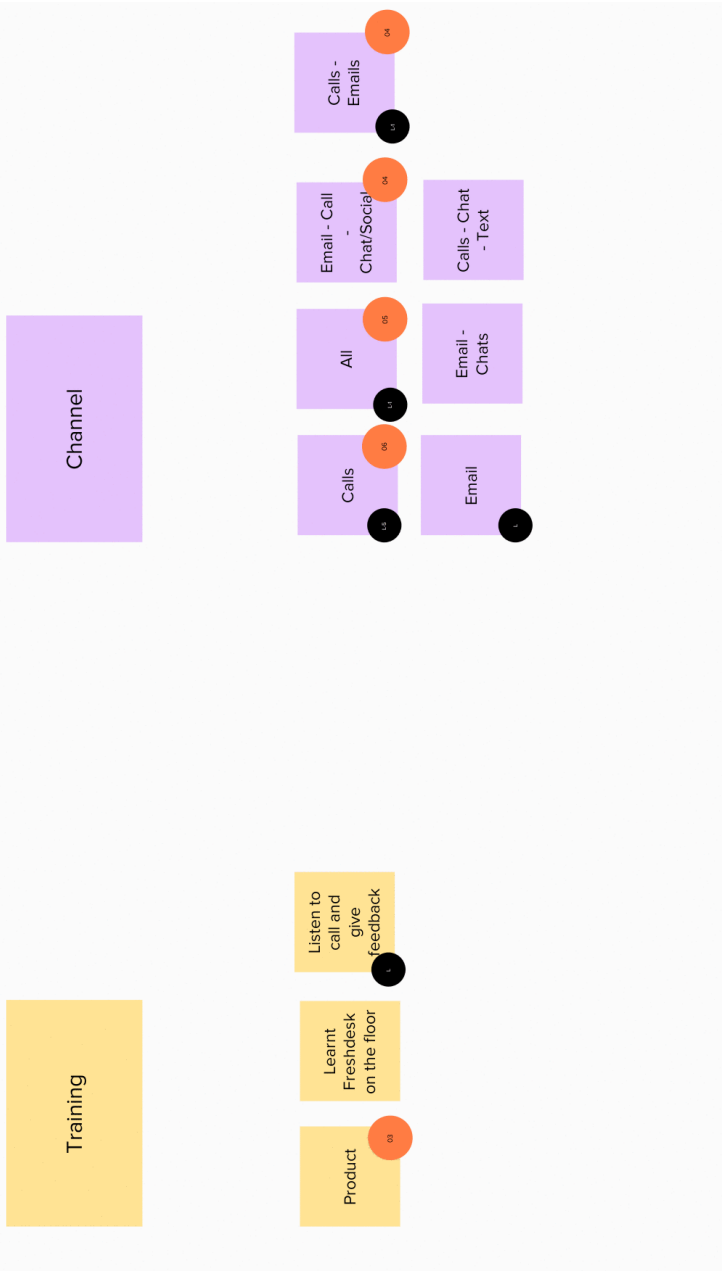












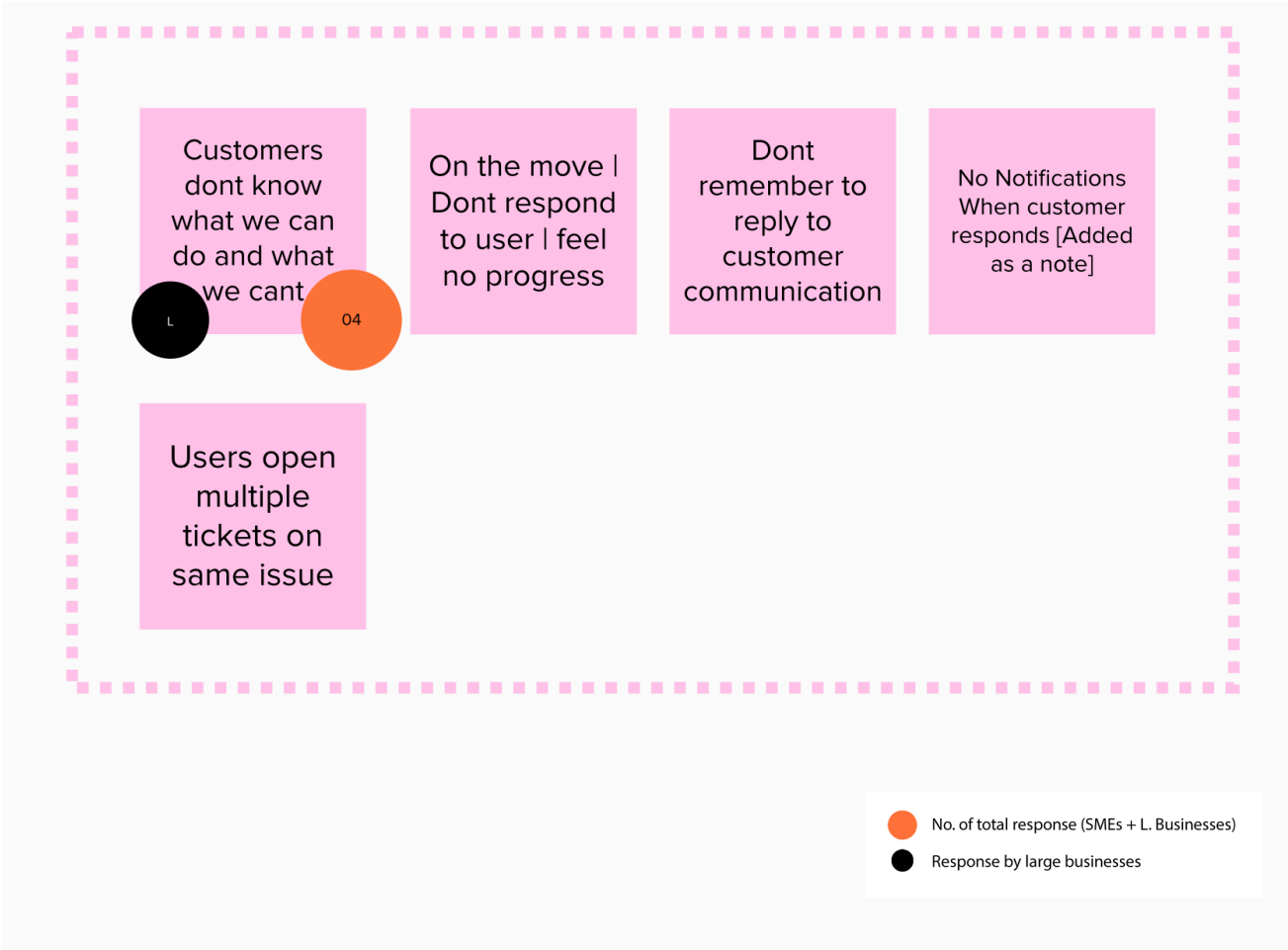
● No. of total response (SMEs + L. Businesses)
● Response by large businesses

Service Insights Breakdown

/ Primary Research

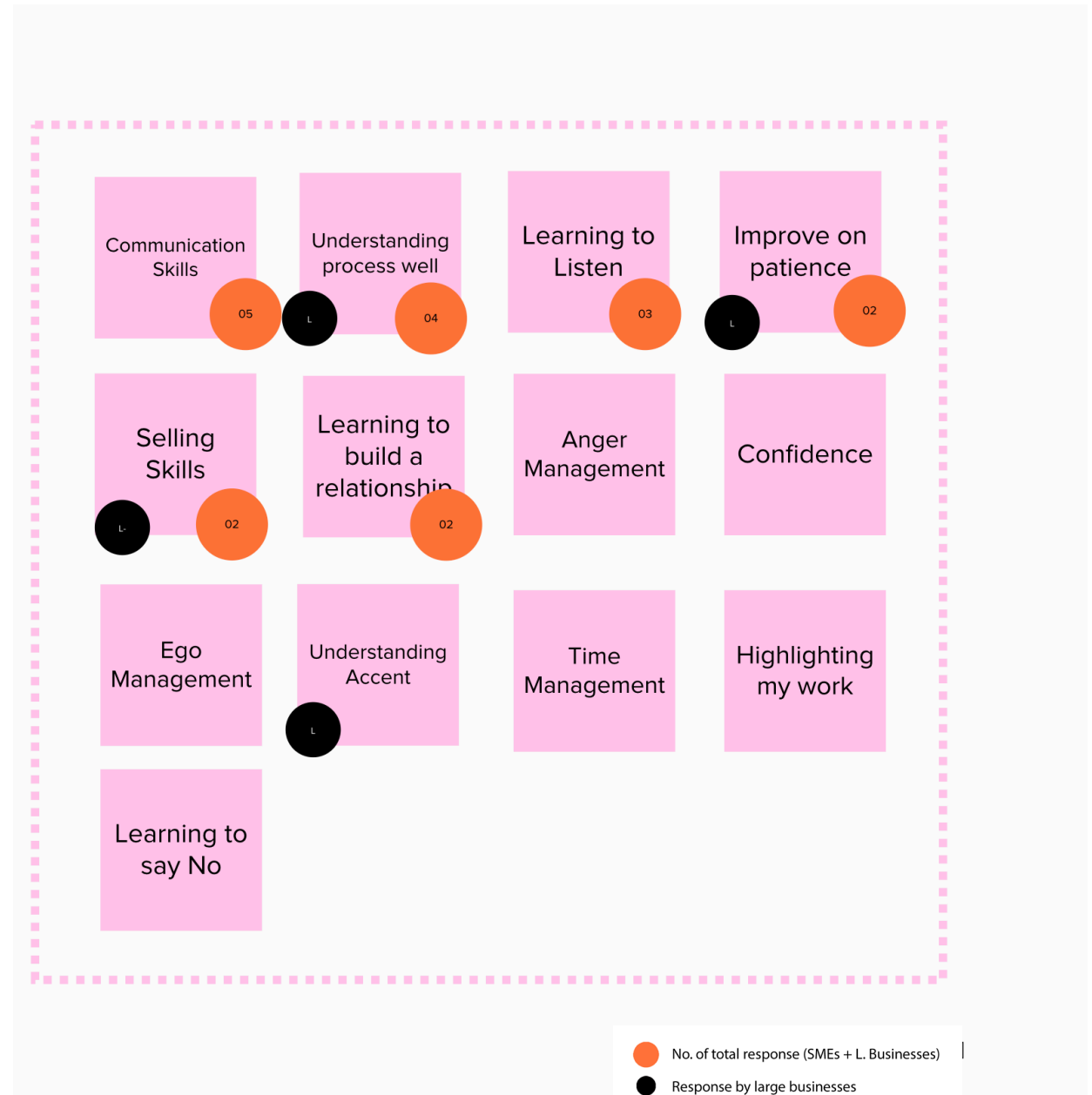


Trust and Transparency - Agents spoke about how they would like to improve trust with the customer, keep them updated and remember to respond



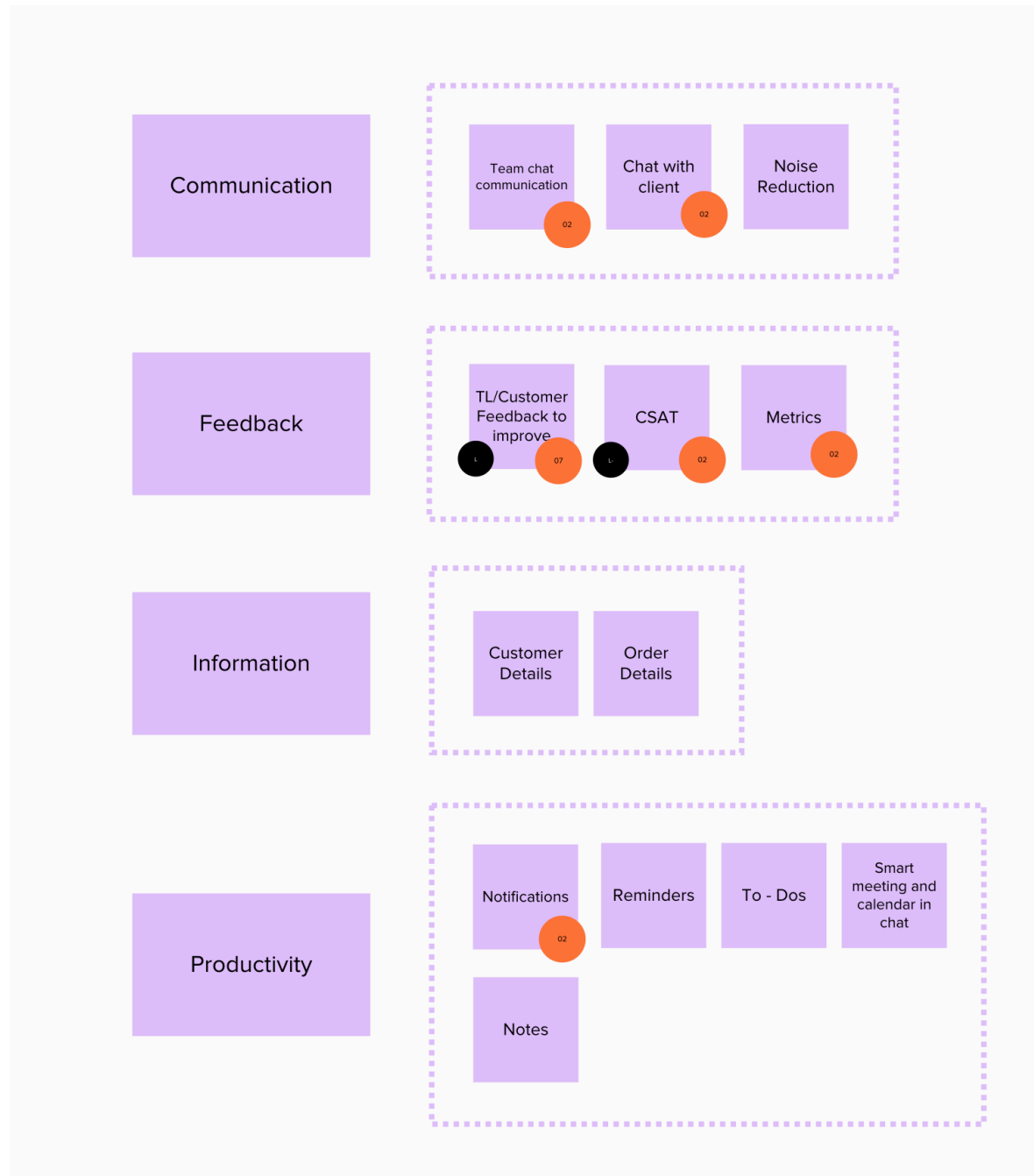


Self Improvement - Most of the research focus on CRM's advantages for business and/or customers. What about the agents? What do they want?



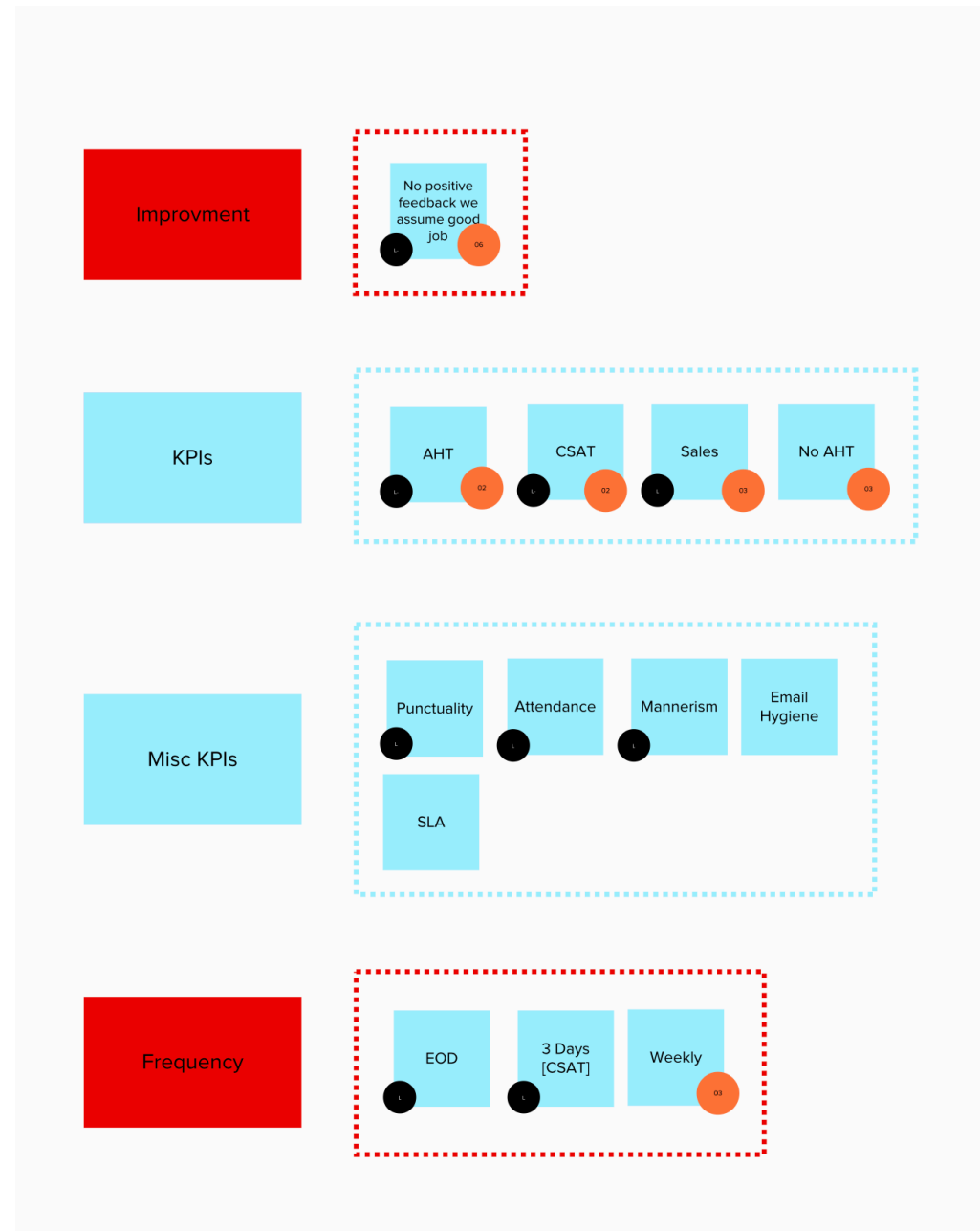


Mobile Features - Feedback and To-Dos, Reminder/Notification s topped the list of features.



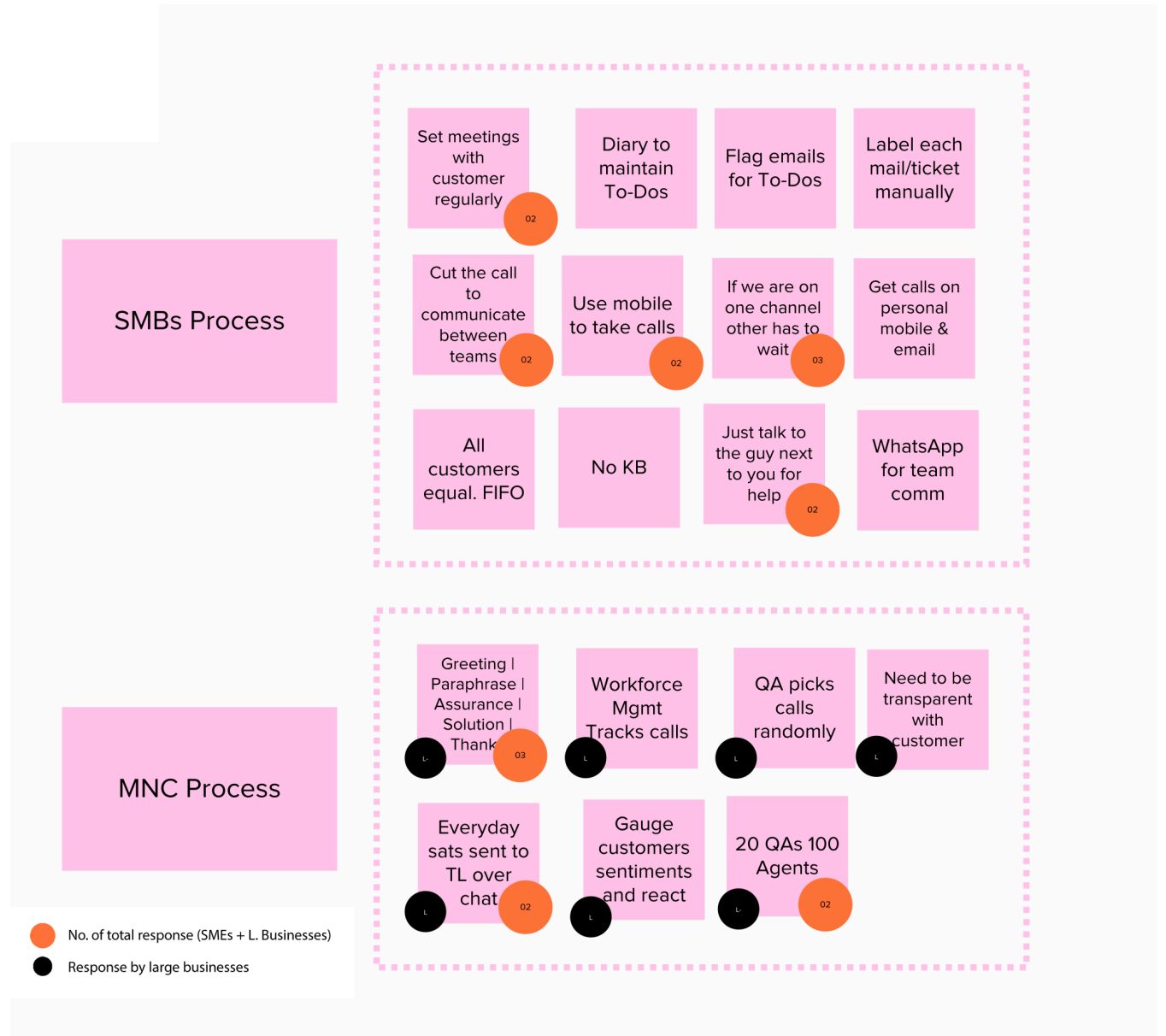


Metrics and Feedback - All of the feedback given is reactive in nature and the agent has already made the mistakes several times before it comes to anyones notice.





Process - The process of SMEs is very different from that of large orgs. Where the large orgs have defined roles and boundaries SMEs have blended roles.



SMEs vs Large Businesses

/ Primary Research

	 Large Businesses	 Small Businesses
 Process	Rigid Process	Malleable Process
 Role	Only Service	Service, Sales, Account Mgmt
 Channel	Single or Dual	Any Channel that Suite Customers
 Treatment	Priority Wise	All Customers Equal - FIFO
 Pro/Re active	Only queries that customers raise	Check With Customers regularly

It can be seen from the graph below that the participants who worked in a Small and medium Enterprise had fluid roles as compared to defined boundaries in a large enterprise.

Small and Medium Enterprises work very differently from large organizations. Employees in SMEs have blended roles, they do not have defined boundaries they are responsible for customer satisfaction and do what they can to retain the few number of customers they have and get the word going for their product.

Moreover, they do not have a budget to buy a CRM software or to customize them to their needs as they have limited resources and man power to do so. Therefore making this segment a perfect audience for a mobile based CRM Lite.

These blended roles are performed by a typical relation managers-Who has a set of accounts that she/he has to keep and better relations with, try to up-sell/ cross sell products and also hunt for new accounts to achieve set targets.

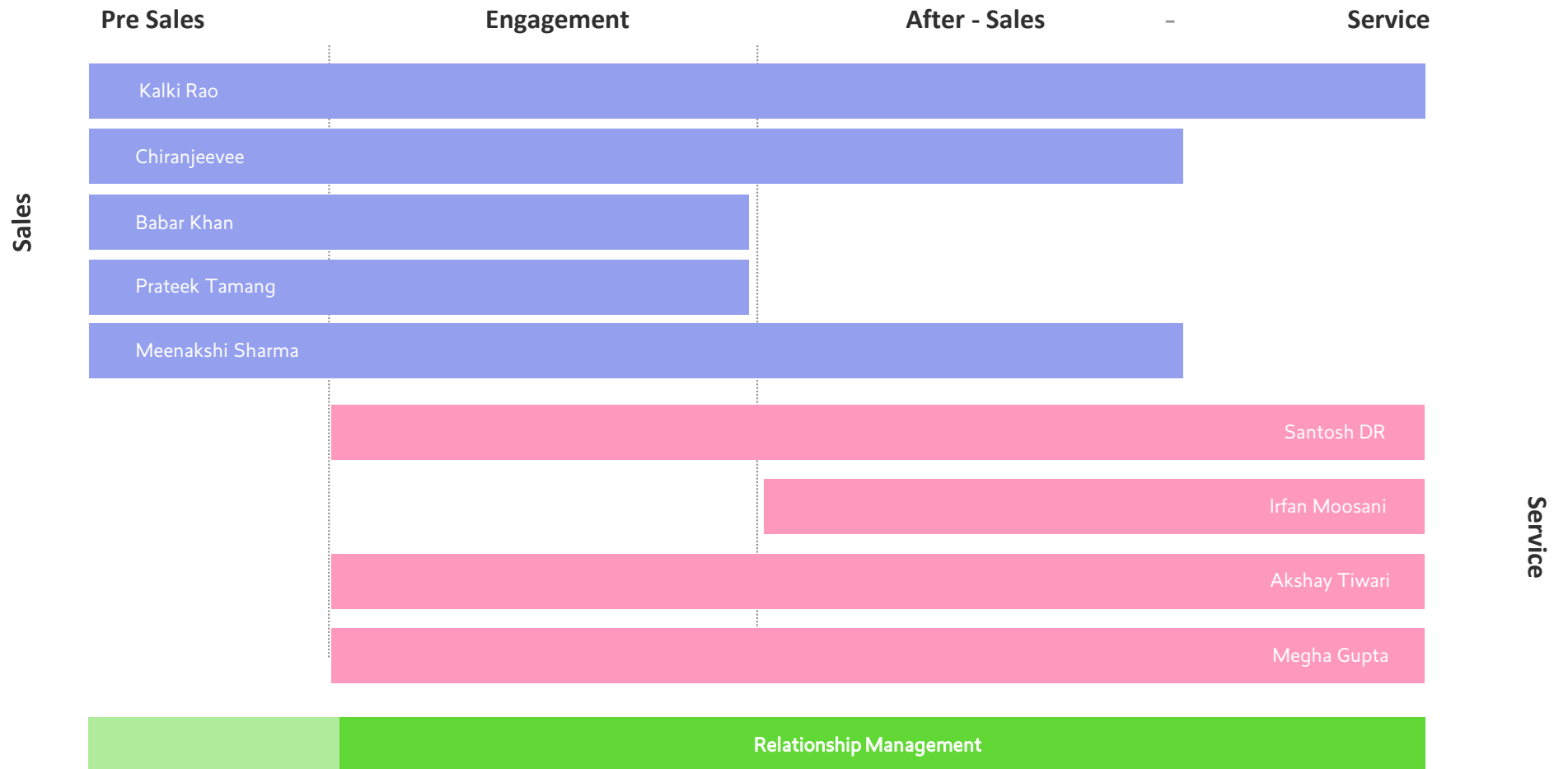


Fig 11. SME participants with blended roles

Ideation

Persona	90
Day in a life of Mohit	92
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Persona

/ Ideation

Mohit Gupta

Work Ex : 6 Months

Company : FitFreaks

Org Type : SME

Personality :

- **Social** - Loves to talk to people and get to know them.
- **Ambitious** - He knows where he wants to be and works hard to achieve his dream
- **Smooth Talker** - He knows the selling game very well and can handle all types of customers
- **Frustrations** - It quite difficult for him to find the right decision maker. Even if he finds the right person to contact, getting their contact details or the right time to talk to them is gamble. Some clients pull out of a deal midway, he always wonders what made them do that?

Quote :

"Never wait for the client to call you. Pick the phone up and talk to them. Build a healthy relationship. Everything else will follow"



More about Mohit

/ Ideation

What Does Mohit Do?



FreakFits - Mohit works for an e-commerce startup called FreakFits. The company has less than 50 employees and is just over an year old.



Enables Gyms - Not only does FreakFit sell gym equipment it also is an online platform for gym and their customers to stay in touch.



Relationship Manager - Mohit handles 8 accounts currently, his job is to keep his accounts satisfied and up sell / cross sell products to them as and when necessary.



All Star - Mohit is doing quite well and is ready to take on new challenges, he wants to get more accounts under his belt and improve sales numbers and profitability of his company.

How Does He Do It?



Primary Channel - Mohit most used medium of communication with his accounts is over email. He prefers email as all the conversations are archived for reference and proof purposes.



Secondary Channel - Although his accounts can reach out to his on any channel convenient to them. He is mostly asked to travel to site or an F2F conversation or using instant messaging.



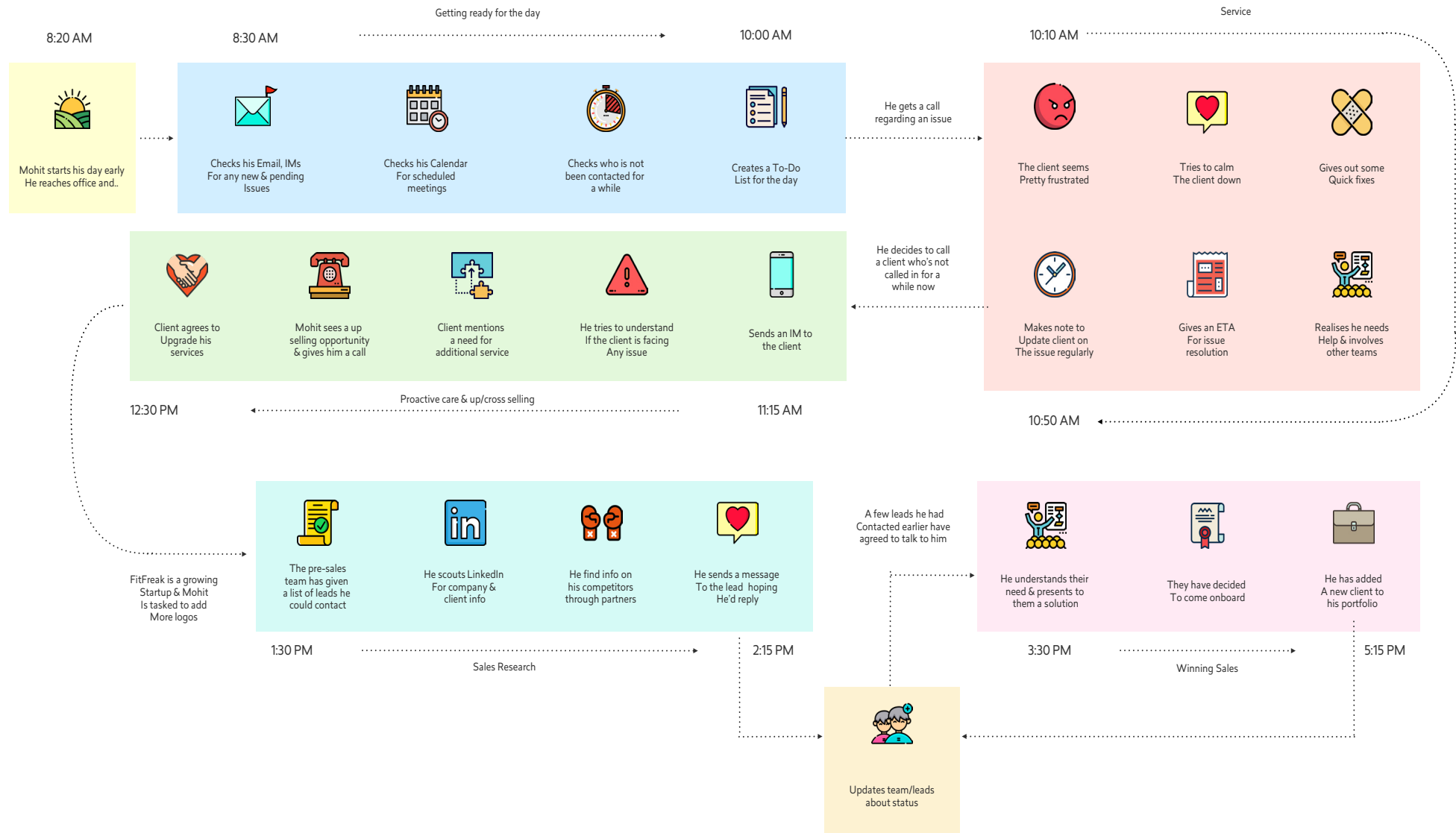
Add More Accounts - As a rapidly growing startup Mohit is tasked to attract more and more clients to his portfolio, for this quarter he is tasked to add 5 more accounts successfully.



Time Spent Hunting - Mohit Currently spends 60% of his time hunting for new clients and gathering information about them, helping existing accounts only takes up about 40% of his time.

Day in a life of Mohit

/ Ideation



Redefined Brief

How do we leverage on our [Microsoft's] infrastructure to provide the insights a relationship manager needs in an easy digestible form to make them do what they do best - better relations.

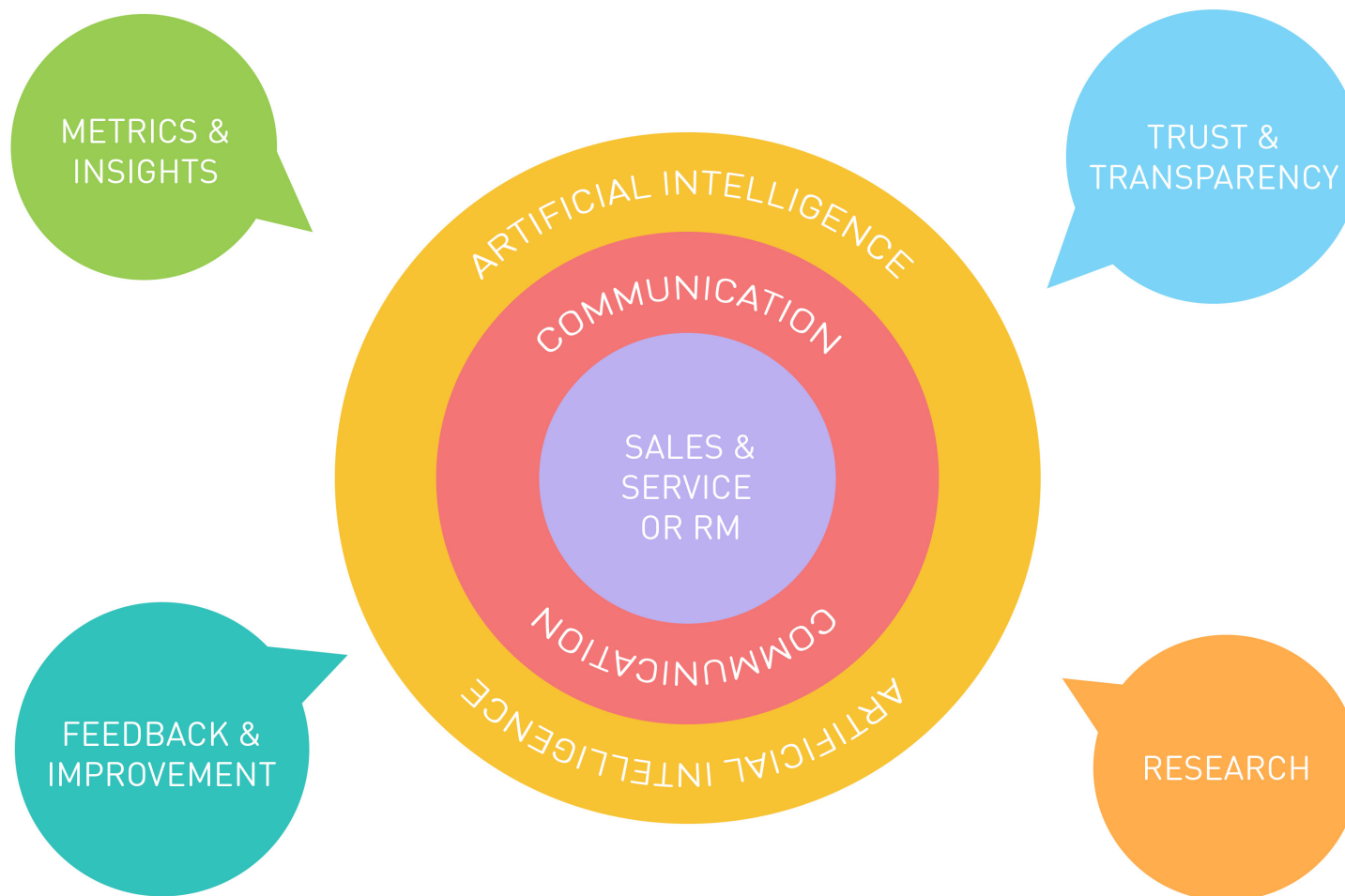


Fig 12. Leveraging Microsoft's Infrastructure to provide easy to digest insights



Brainstorming

Concepts

/ Ideation

CR

Client research & insights : An app that helps in researching and gathering insights about potential clients and existing accounts. And provide information in a digestible format with auto reminders and to -dos.

YI

Your insights : An app that helps you with your pipeline, it tracks your conversations with your accounts and gives you insights on how to improve and be a better relationship manager.

CO

Communication hub : All communication from all channels in one app, giving the relationship manager one single view all the communication with the account.

GS

Goal setting and improvement : A vision of future self as a relationship manager and constructing improvement plans that is custom made for the RM.

TO

Today's focus : Taking one day at a time, giving reminders, To-Dos and insights for today, decreasing the information overload and keeping the RM focused on the important tasks.

SO

Social gamification : Insights on who in the team is doing what and at which stage in their pipeline are they, how many accounts converted, leader board and feedback.

TS

Task scheduling : Relationship Managers need to interact with a lot of teams and 3rd parties to get things done for their accounts. An app that is a one stop shop for all the tasks, schedule, assign, track all tasks.

IF

If this then that : An app that lets you automate tasks and assign reactions to an occurrence to an action that would auto trigger.

Final Concepts

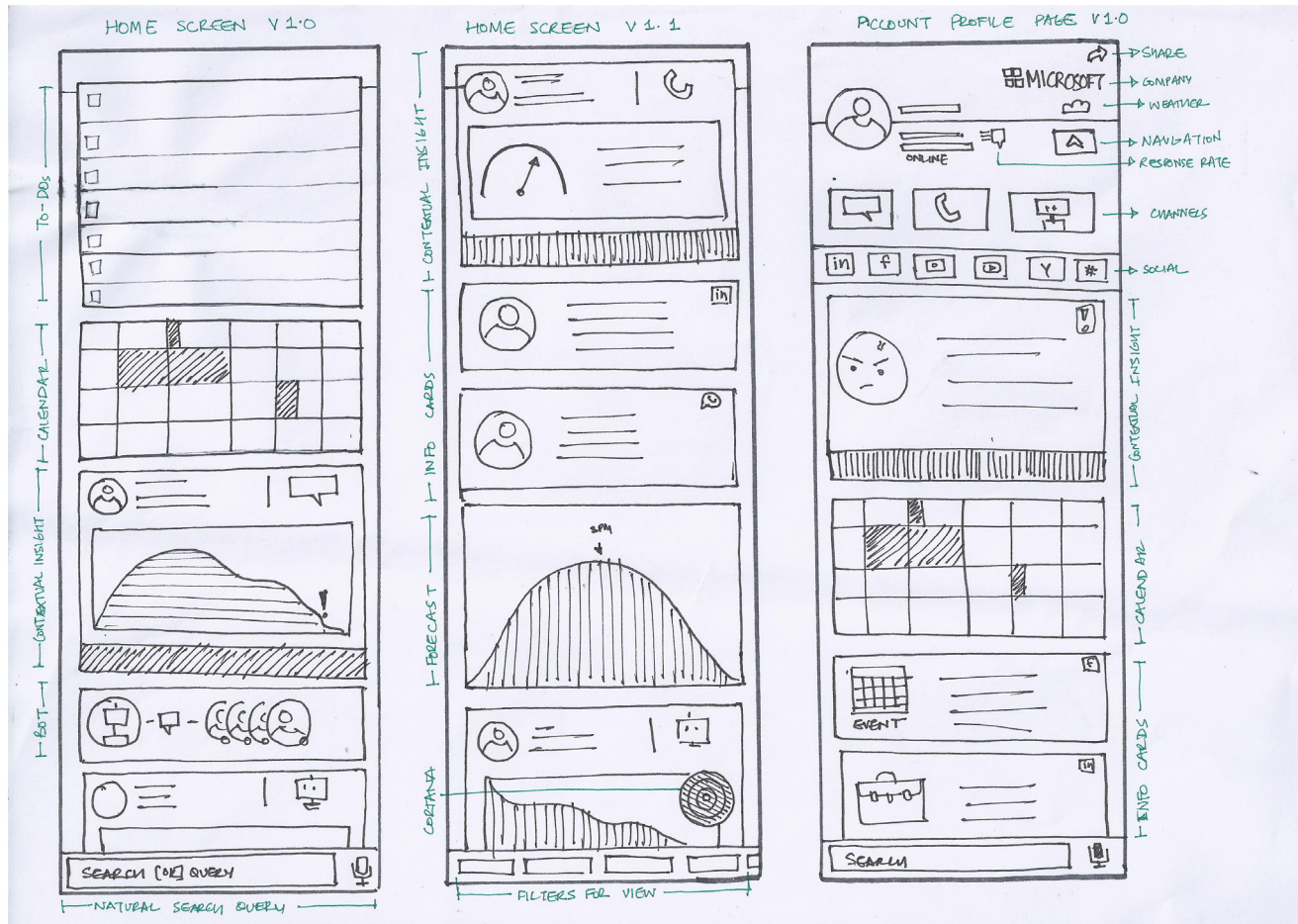
/ Ideation

Taking forward:



Today's focus : Taking one day at a time, giving reminders, To-Dos and insights for today, decreasing the information overload and keeping the RM focused on the important tasks.

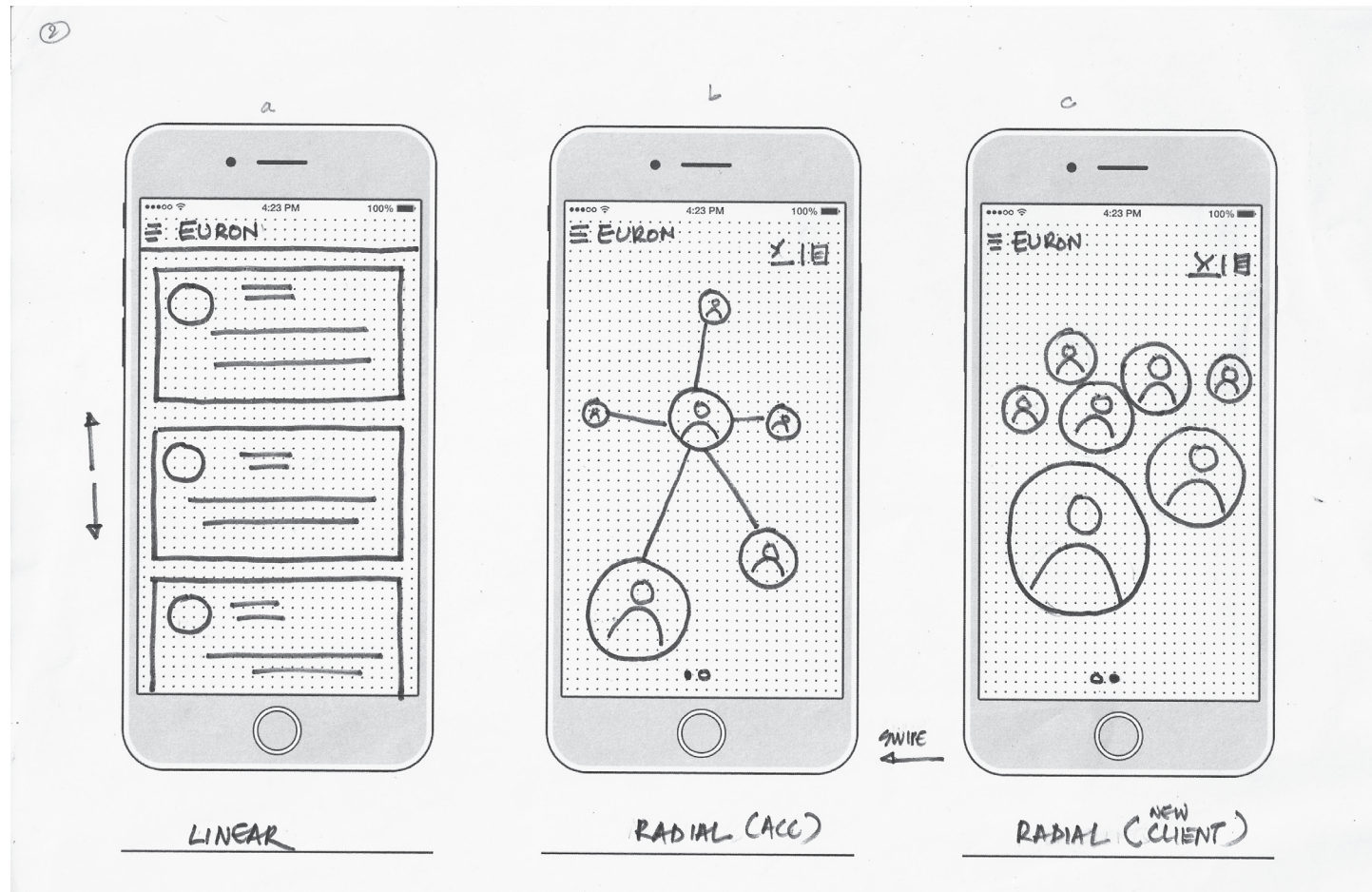
Explorations / Ideation



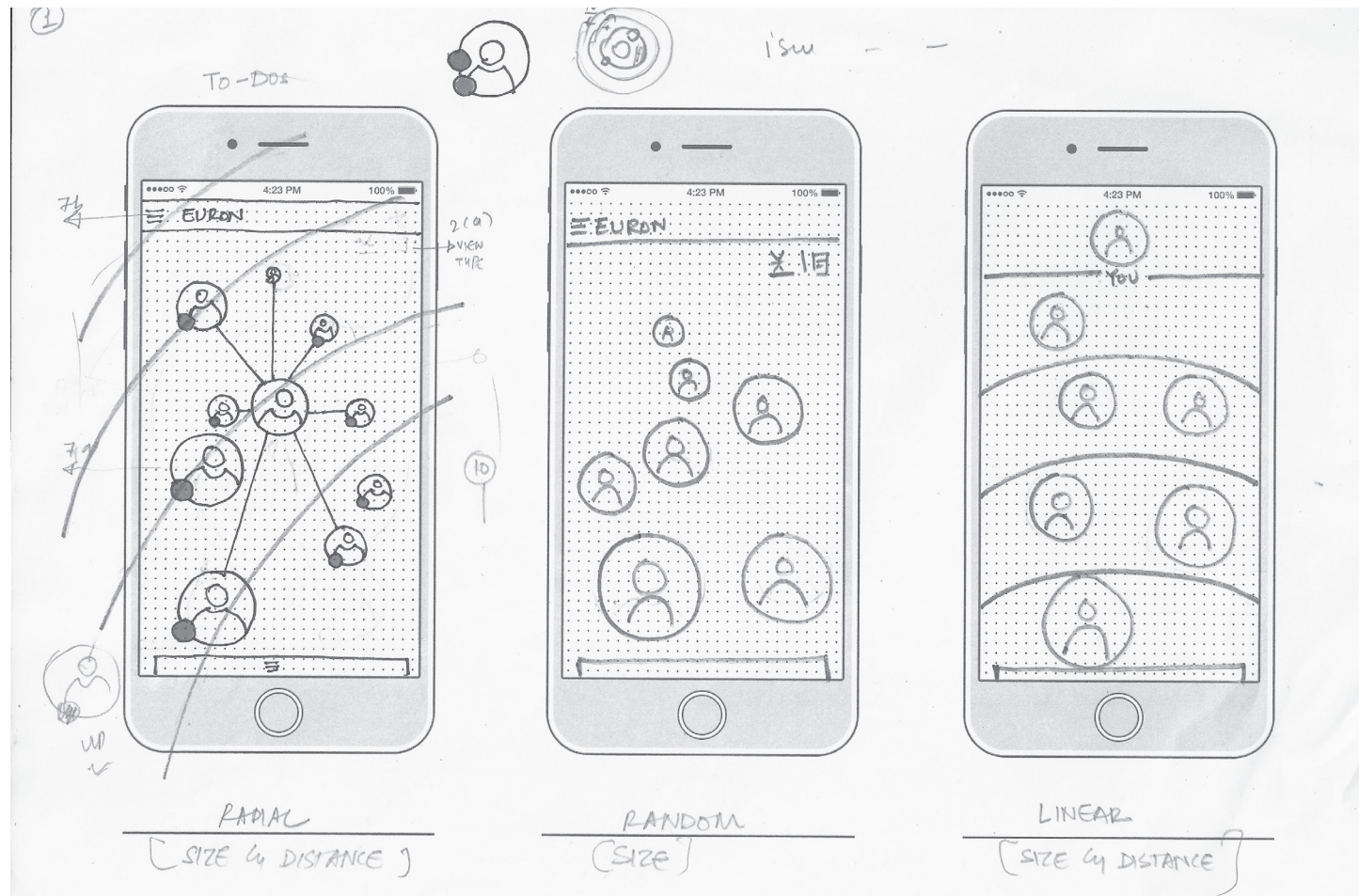
Initial explorations looked at how data can be presented linearly about an account, gathering insights from various channels. But the view was very data heavy and required a more visual way of representation of the important data.



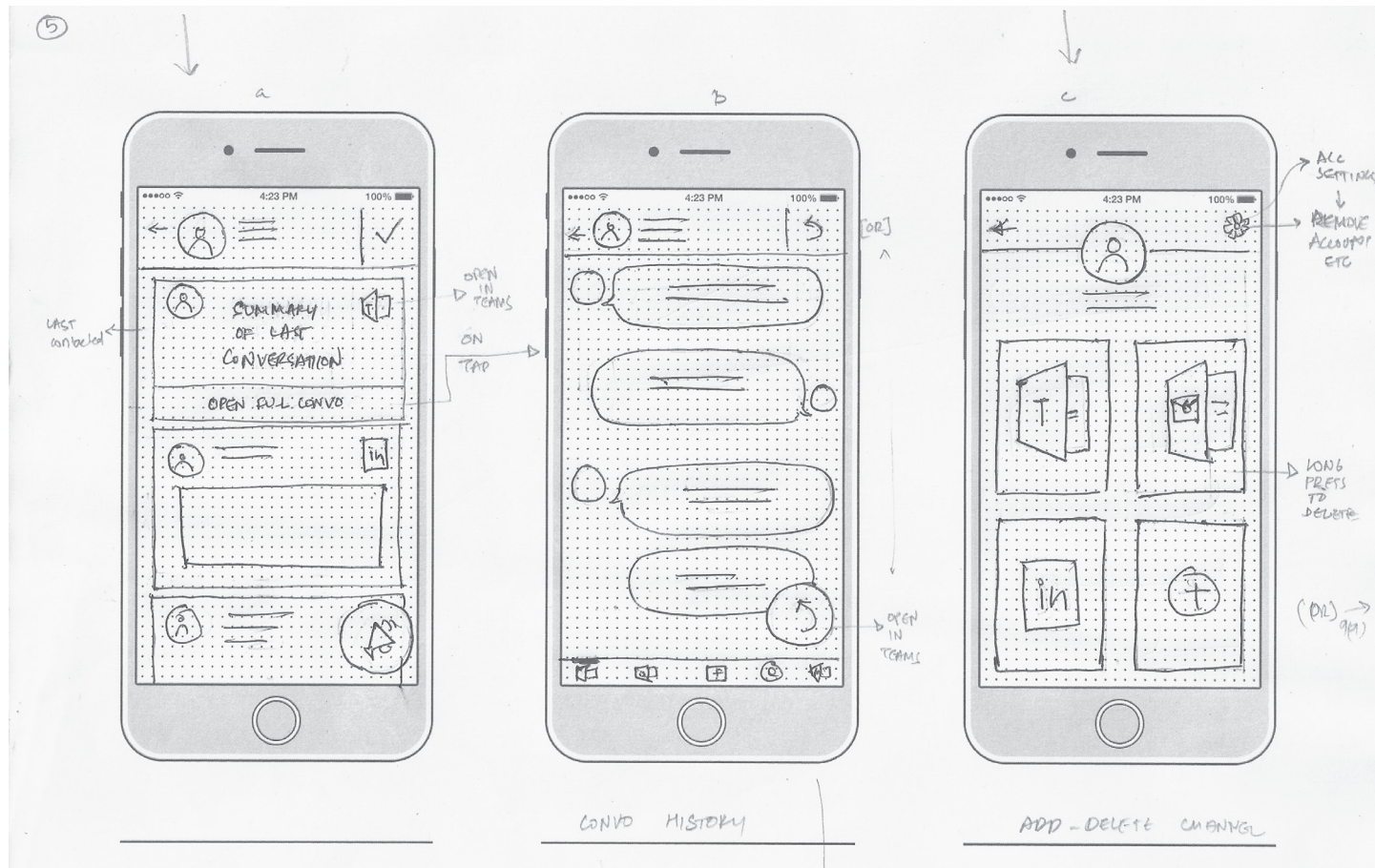
The new explorations covered different ways of representing the to-do's more visually while giving layered information about the issue faced.



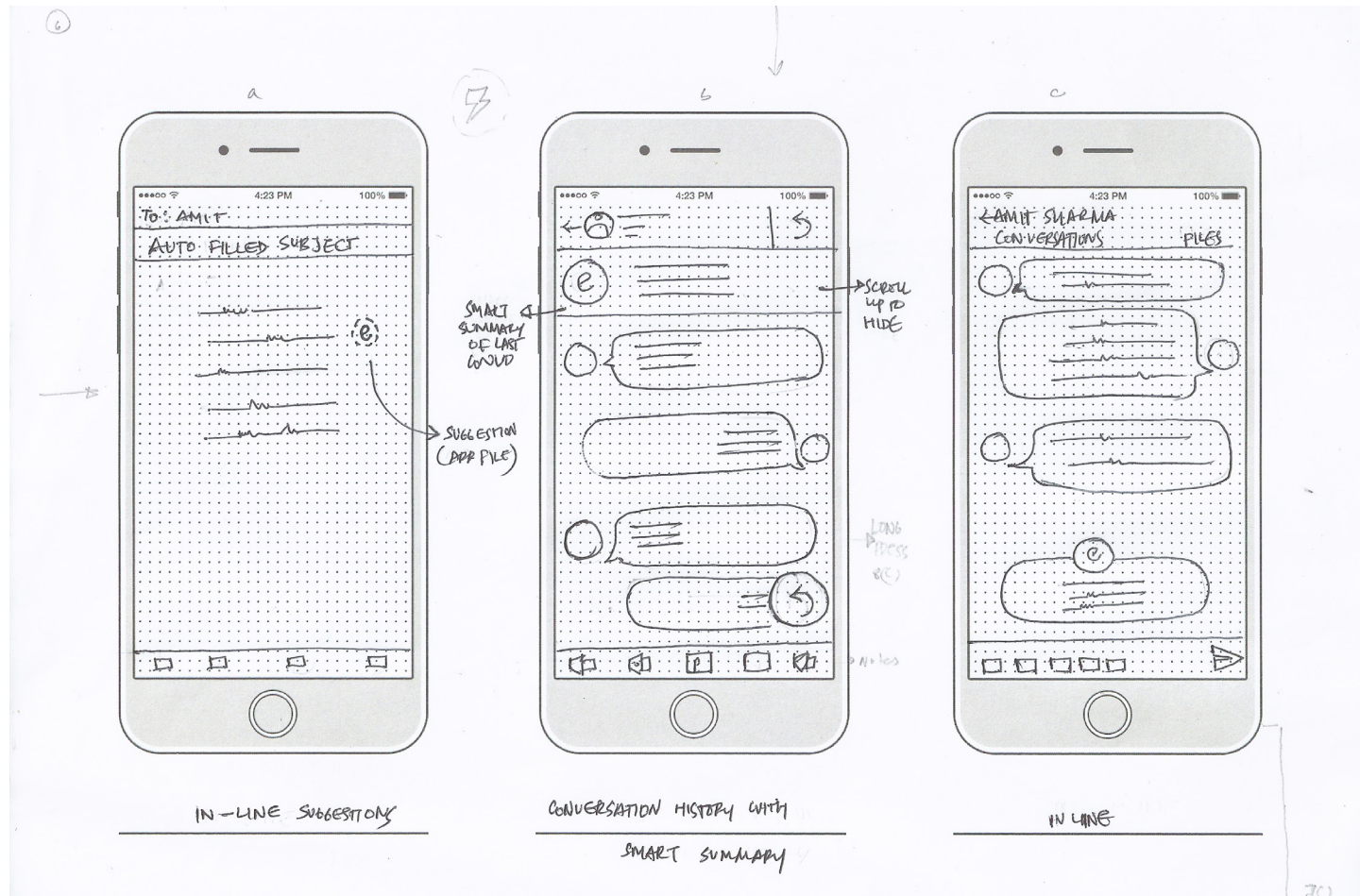
Dashboard explorations



Dashboard explorations



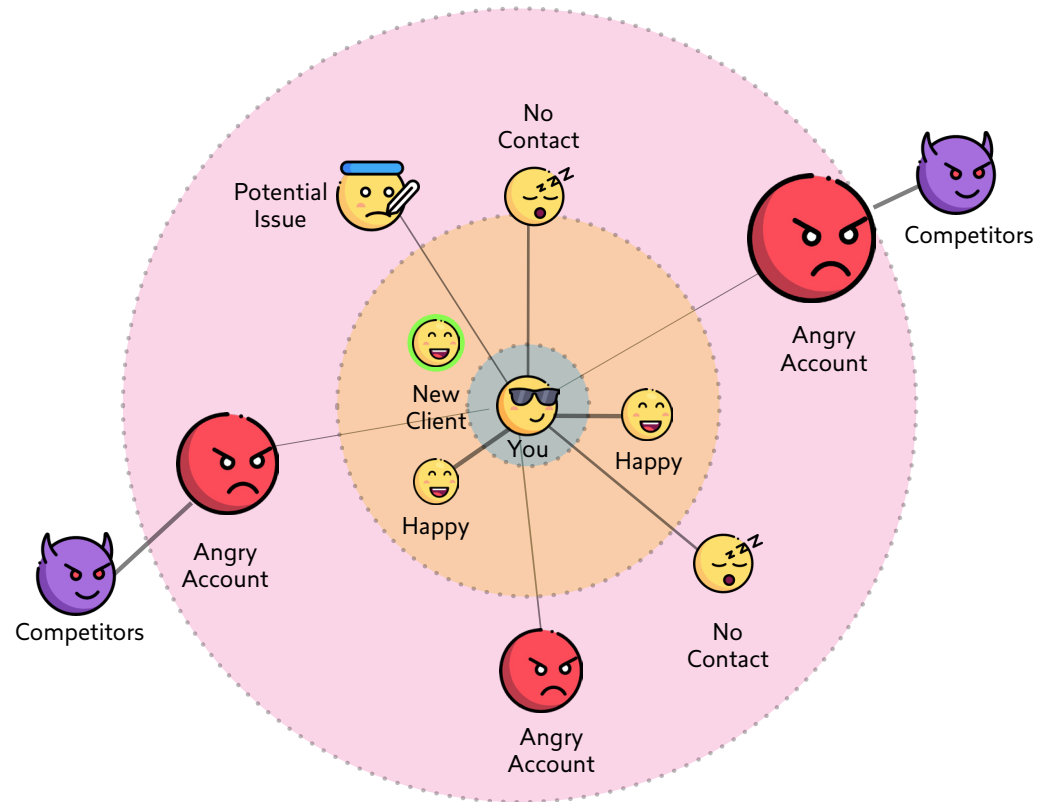
Level 2 of the dashboard where more deep down information is presented about the issue and allows the manager to communicated with the account without switching context.



Smart contextual suggestion exploration on how the app can provide suggestions during a conversation with the account to help in solving, selling and improving the quality of communication.

Radial Depiction / Ideation

A relationship manager cares about the strength of the relationships with her/his accounts, she/he wants to understand which of her/his accounts are close and happy and which ones are getting away from her/him and are unhappy with his service. Some might even be in contact with competitors to switch to their service. These are vital information that the agent would need to retain his accounts.



Scenarios

Mohit's Frustrations

/ Ideation



Daily Routine : He goes from one gym to another in his defined area and tries to get them on board his service.



Reminders and To-Dos : He makes notes and marks his emails to keep track of day to day events and sometimes forgets to work on issues or call back an account with updates making them unhappy.



Low Conversion : Decision makers are not usually present at the gym and this reduces his chances of conversion. He usually tries to fix an appointment from the manager at the gym.



Loosing the Game : He has lost two accounts to cure fit in the last year itself and doesn't know what to do. He doesn't realize how and when cure fit was able to take his accounts from below his nose.



Feeling Helpless : His conversion rate is low and he feels he's very unproductive but he doesn't know what he can do.



Time for Change : He is extremely frustrated with the way his work is going and decides to make a few changes...

Mohit's Frustrations

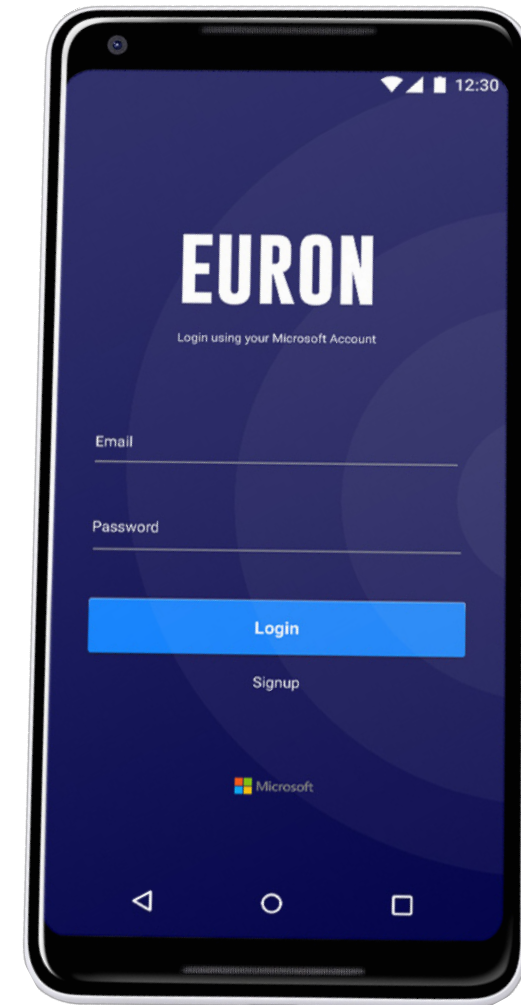
/ Ideation

He doesn't need a CRM system because of the low number of clients he has to handle

He needs to know the health of his relationships with his accounts with any insights that can help, and any new accounts that he can bring in.

He heard about this app called Euron by Microsoft that is designed for people just like him

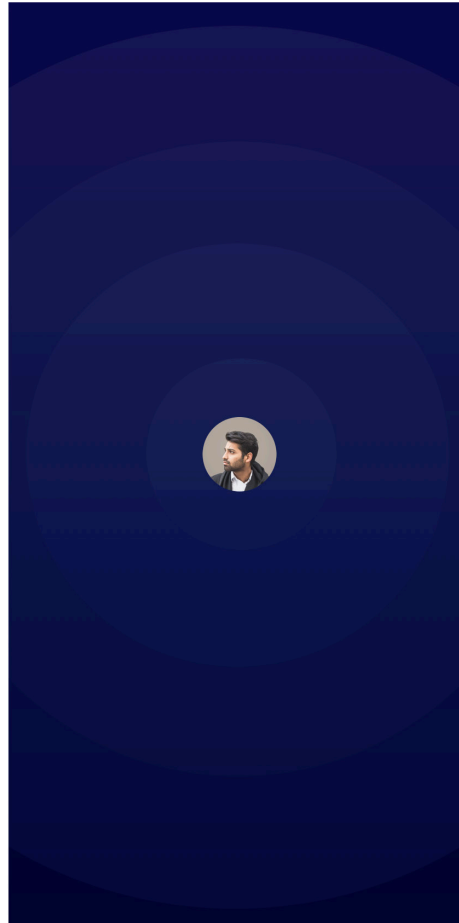
And decides to give it a try....



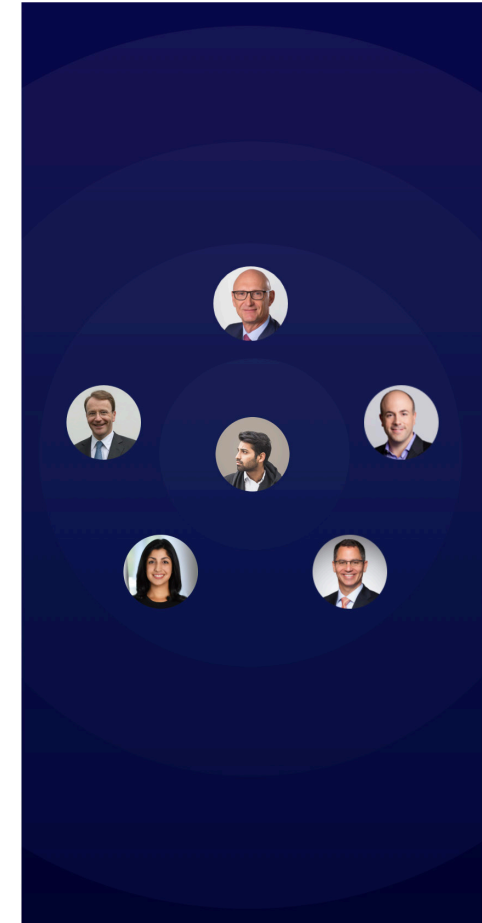
Project Euron / Ideation



Concentric circles depict relative distances

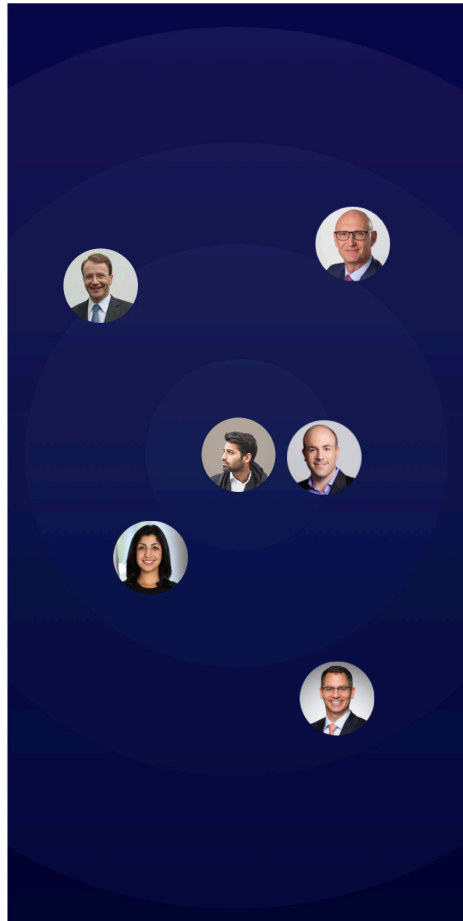


Mohit the relationship manager is in the center

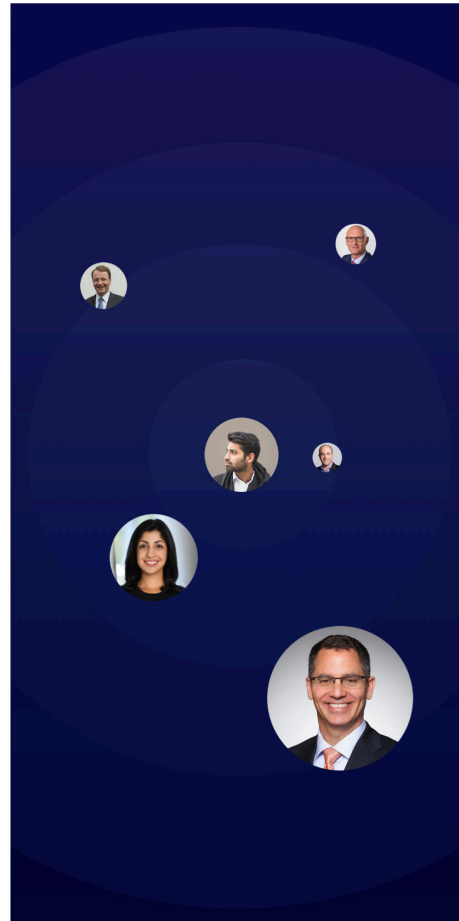


Euron goes through all the channels (Email, social media etc) and brings up accounts that he needs to contact today

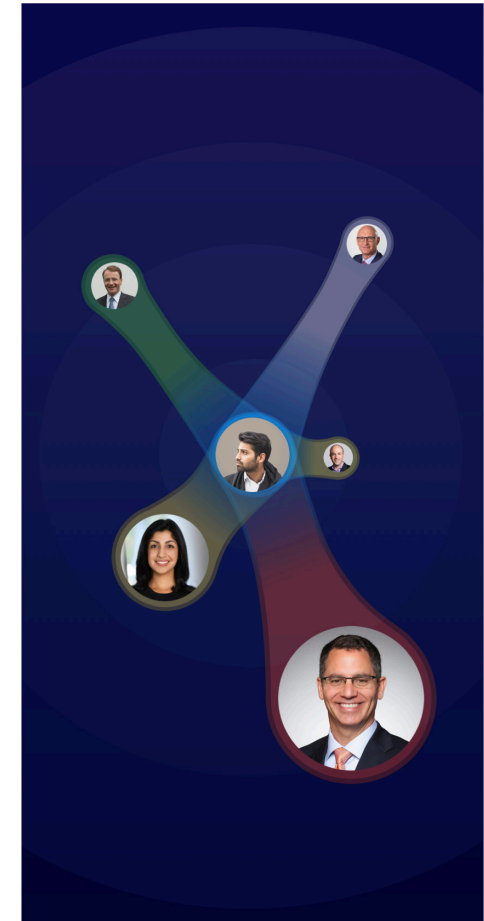
Project Euron / Ideation



Euron analysis the sentiments of all conversations with these accounts and brings them closer or farther from Mohit



The size depict the order in which the accounts need to be contacted



Finally the colors depict the type of issue the account is facing. Creating a To-Do list dashboard

To - Do Dashboard / Ideation

1. Accounts facing issues

Analysis of various customer touchpoint

2. Priority of focus

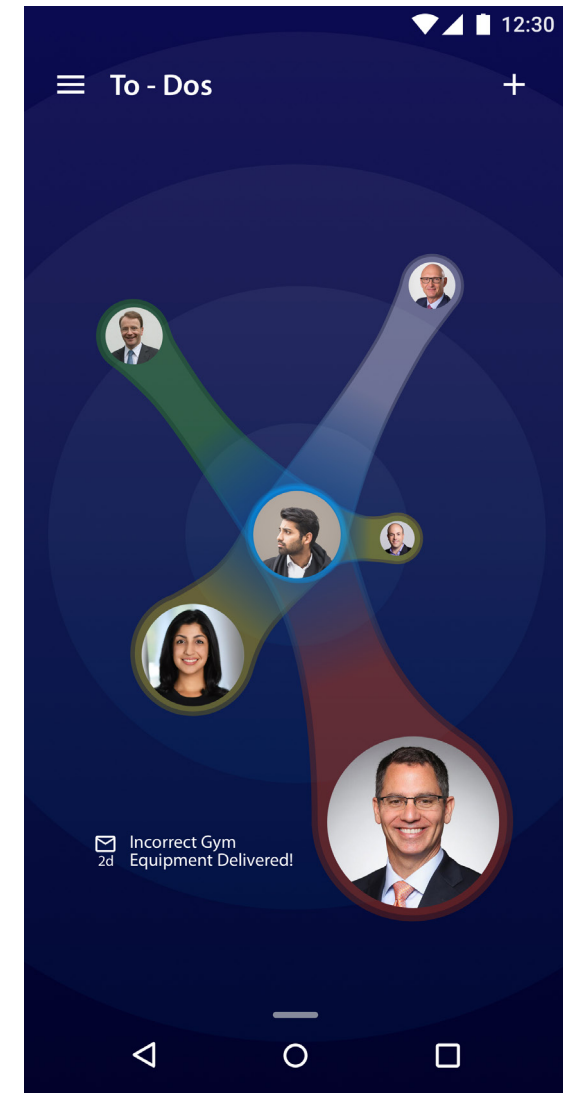
Size - Large to small

3. Relationship Strength

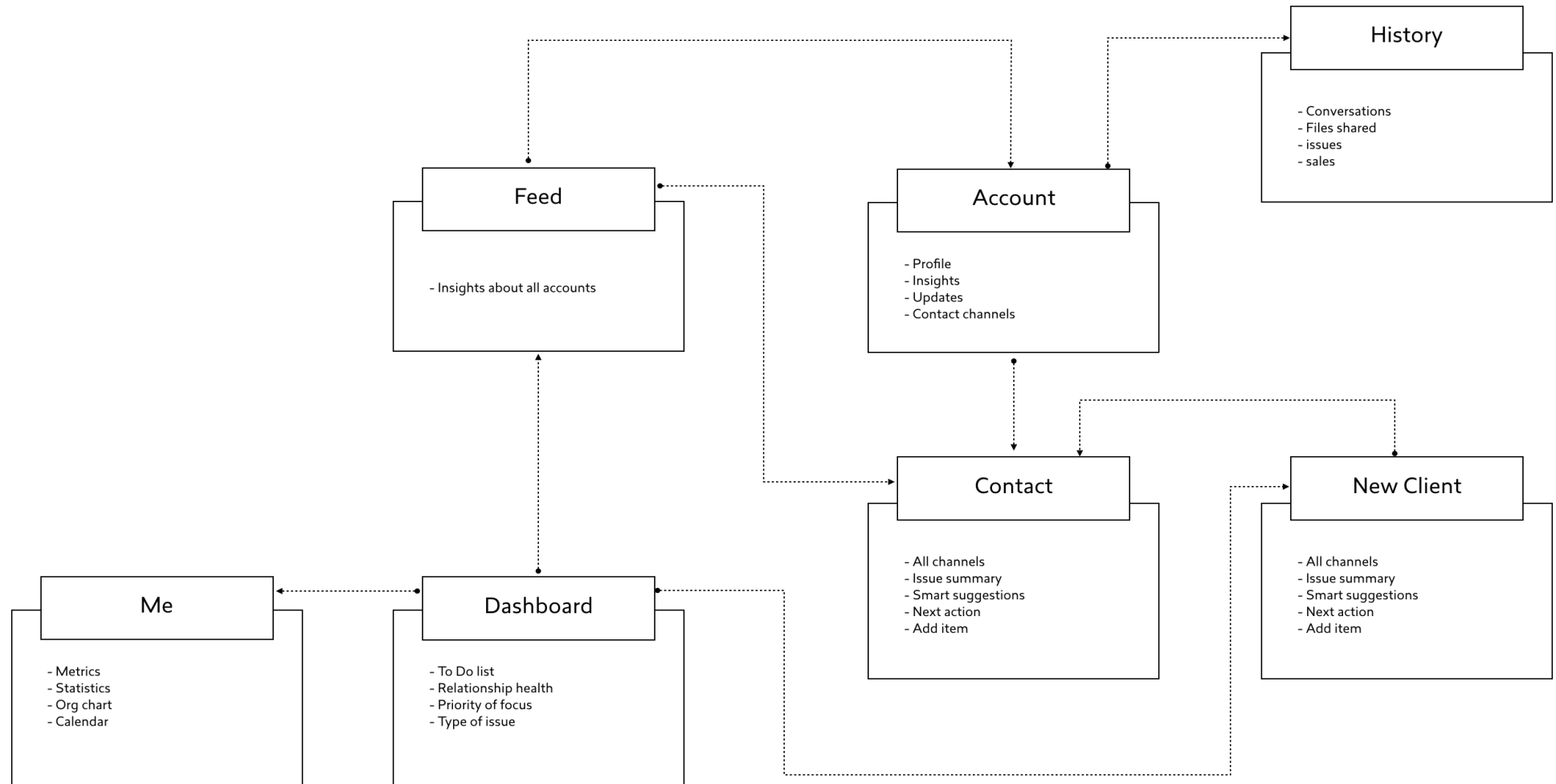
Relative distance from Mohit

4. Issue type

● Issue ● Potential Issue ● Not Contacted ● Sell opportunity



Information Architecture / Ideation

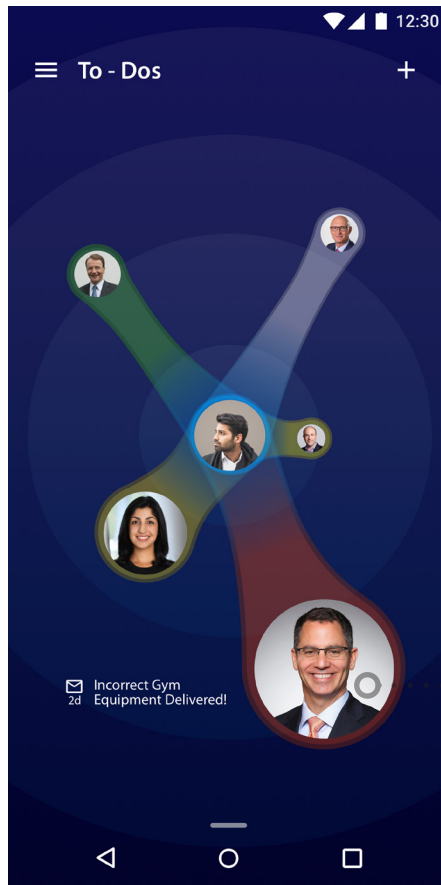


Scenario - 1

Service : **Reactive**

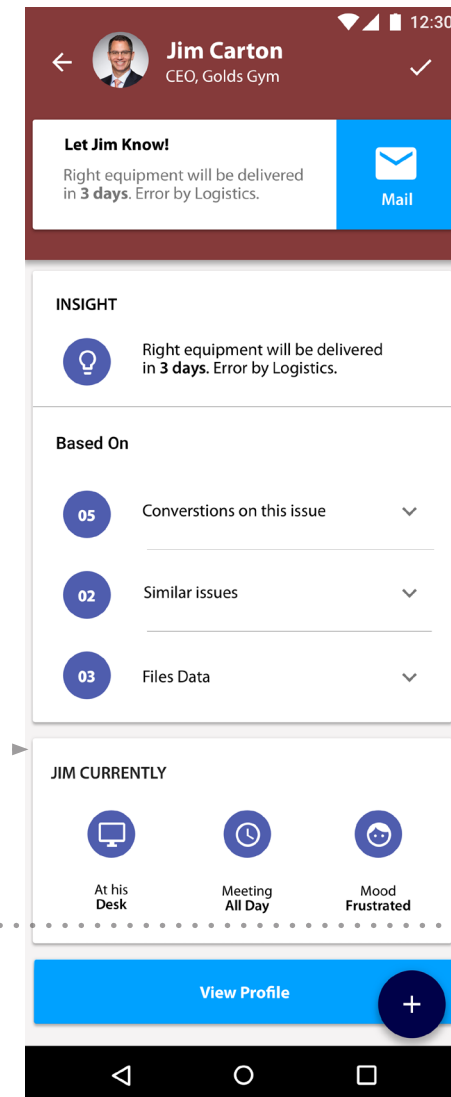
Jim, an account of Mohit is facing an issue of wrong equipment delivery.

Scenario 1 / Service : Reactive



On Tap

Fold

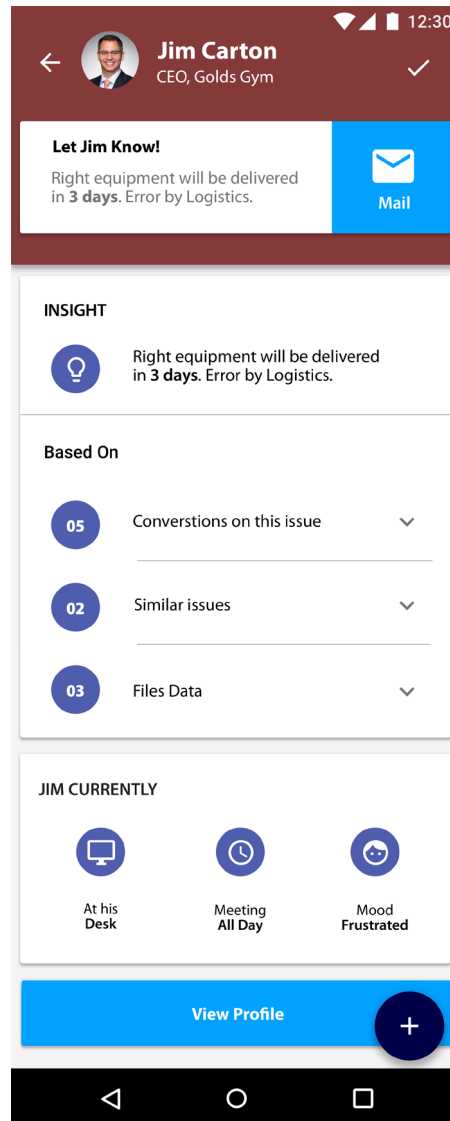


Scenario 1

/ Service : Reactive

History and
Suggestions

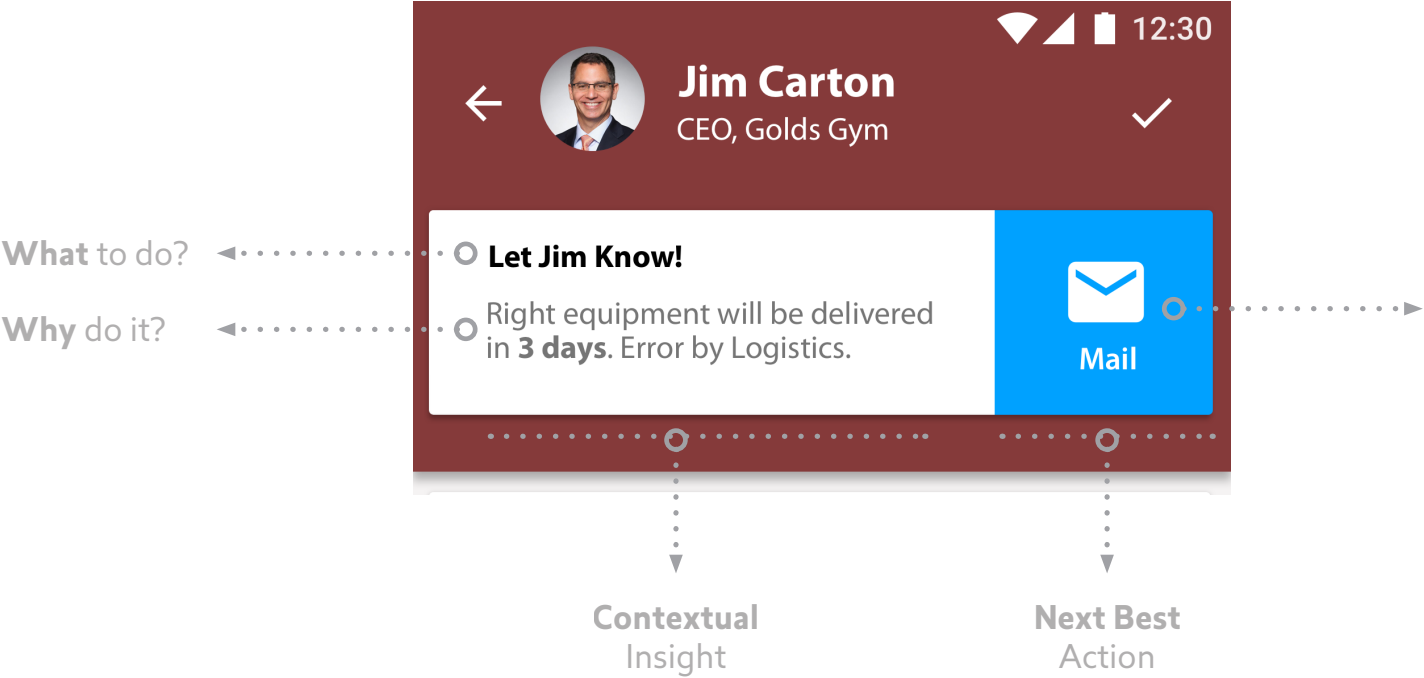
Clients
Current
Context



Contextual
Insight

Contextual Insight Card

/ Service : Reactive



Scenario 1

/ Service : Reactive

Jim Carton
CEO, Golds Gym

Let Jim Know!

Right equipment will be delivered in **3 days**. Error by Logistics.

Mail

INSIGHT

Right equipment will be delivered in **3 days**. Error by Logistics.

Based On

05

Converstions on this issue

▼

02

Similar issues

▼

03

Files Data

▼

Current mood
[Wearable - IoT]

Calendar
[MS Graph]

Current location
[Mobile - IoT]

Based On

05

Converstions on this issue

▼

02

Similar issues

▼

03

Files Data

▼

JIM CURRENTLY

At his Desk

Meeting All Day

Mood Frustrated

View Profile

History of conversation
[MS Graph]

Similar issues faced
in the past
[MS Graph]

Files related to this issue
[MS Graph]

Scenario 1

/ Service : Reactive

History and Suggestions

Clients Current Context

Jim Carton

CEO, Golds Gym

✓

Let Jim Know!

Right equipment will be delivered in 3 days. Error by Logistics.

Mail

INSIGHT

Right equipment will be delivered in 3 days. Error by Logistics.

Based On

05

Converstions on this issue

02

Similar issues

03

Files Data

JIM CURRENTLY

At his Desk

Meeting All Day

Mood Frustrated

View Profile

Contextual Insight

INSIGHT

Right equipment will be delivered in 3 days. Error by Logistics.

BASED ON

05

Converstions on this issue

Rahul Gupta (Logistics)

Accepted the error, scheduled fresh delivery

1d

Jim Carton

Requested an update on the issue from you

2d

You

Asked Rahul from logistics for update on issue

2d

You

Promised Jim a resolution ASAP

2d

Jim Carton

Raised the issue about inccorect delivery

2d

02

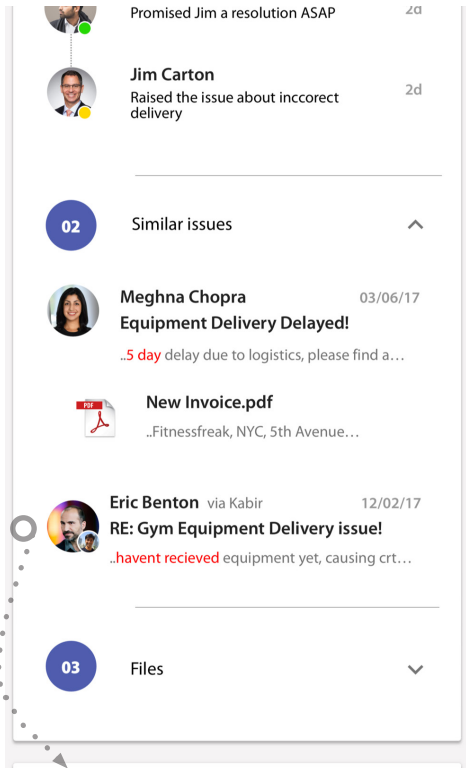
Similar issues

Actions taken in each conversation

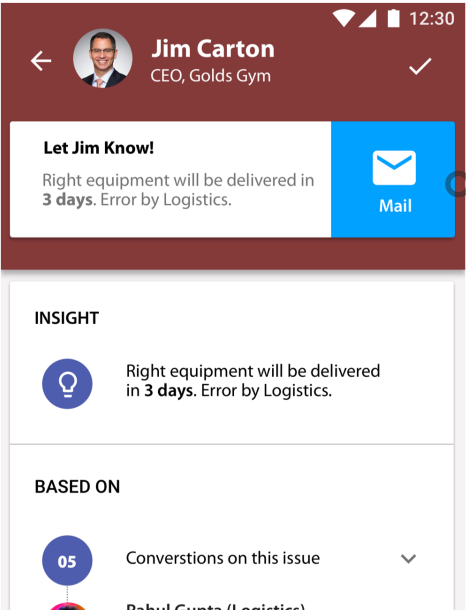
Page 124

Scenario 1

/ Service : Reactive

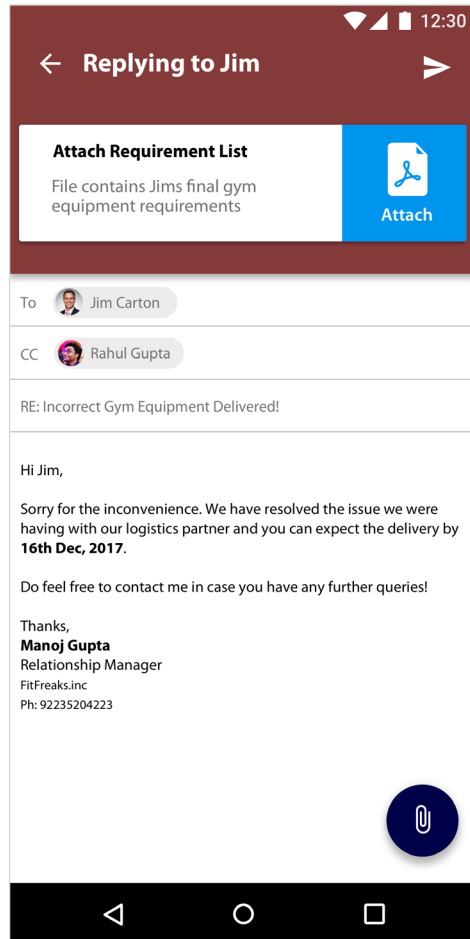


Kabir a relationship manager himself faced this issue a while back
[MS Graph]

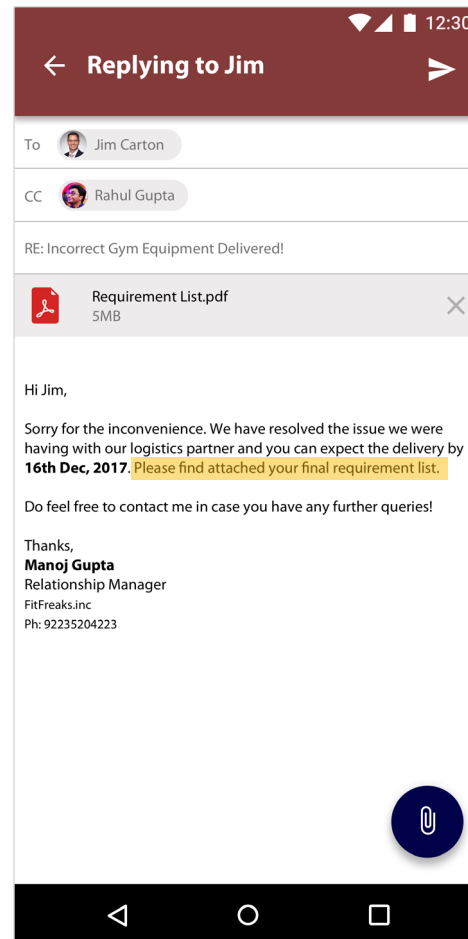


Now that Mohit is well informed with the issue he decides to respond to Jim

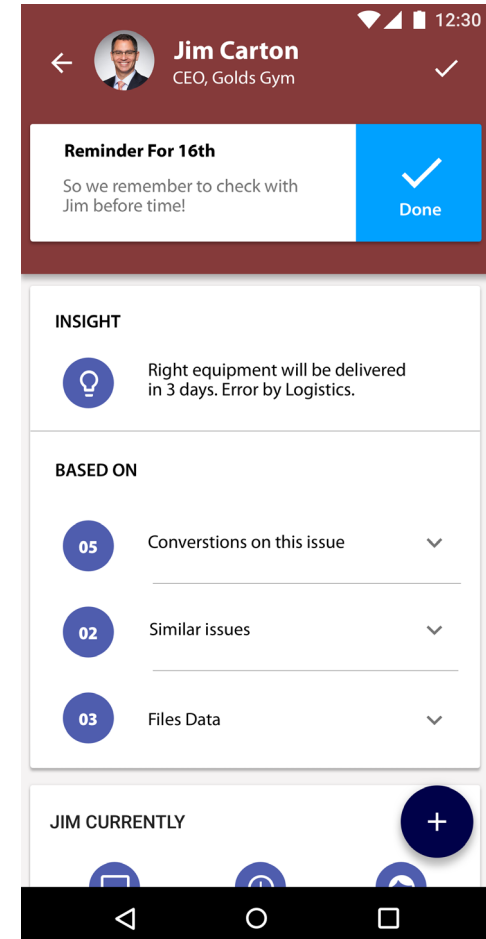
Scenario 1 / Service : Reactive



Mohit starts to write his email and Euron prompts him to attach the requirement list



It not only adds the attachment to the email with one tap but also adds inline message for the same



Euron also sets a reminder .This way he will never forget to contact his clients and keep them updated

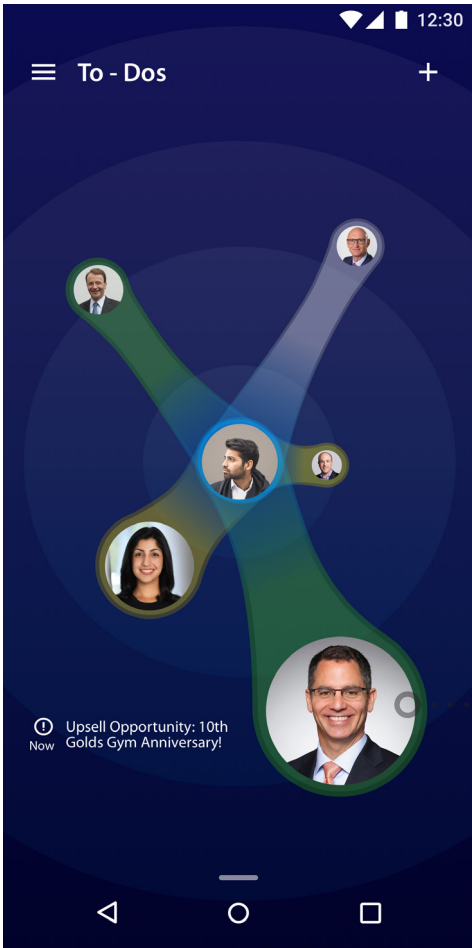
Scenario - 2

Service : Proactive

Gold's gym one of Mohit's account is celebrating their 10th anniversary.

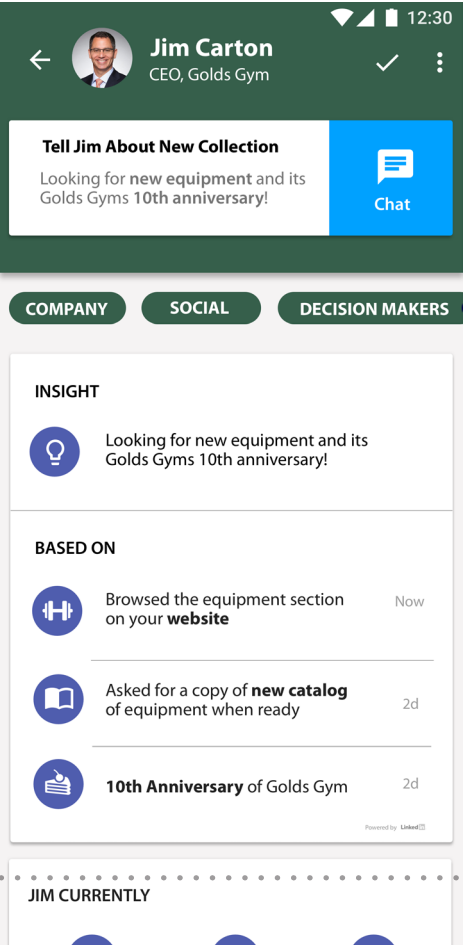
Scenario 2

/ Service : Proactive



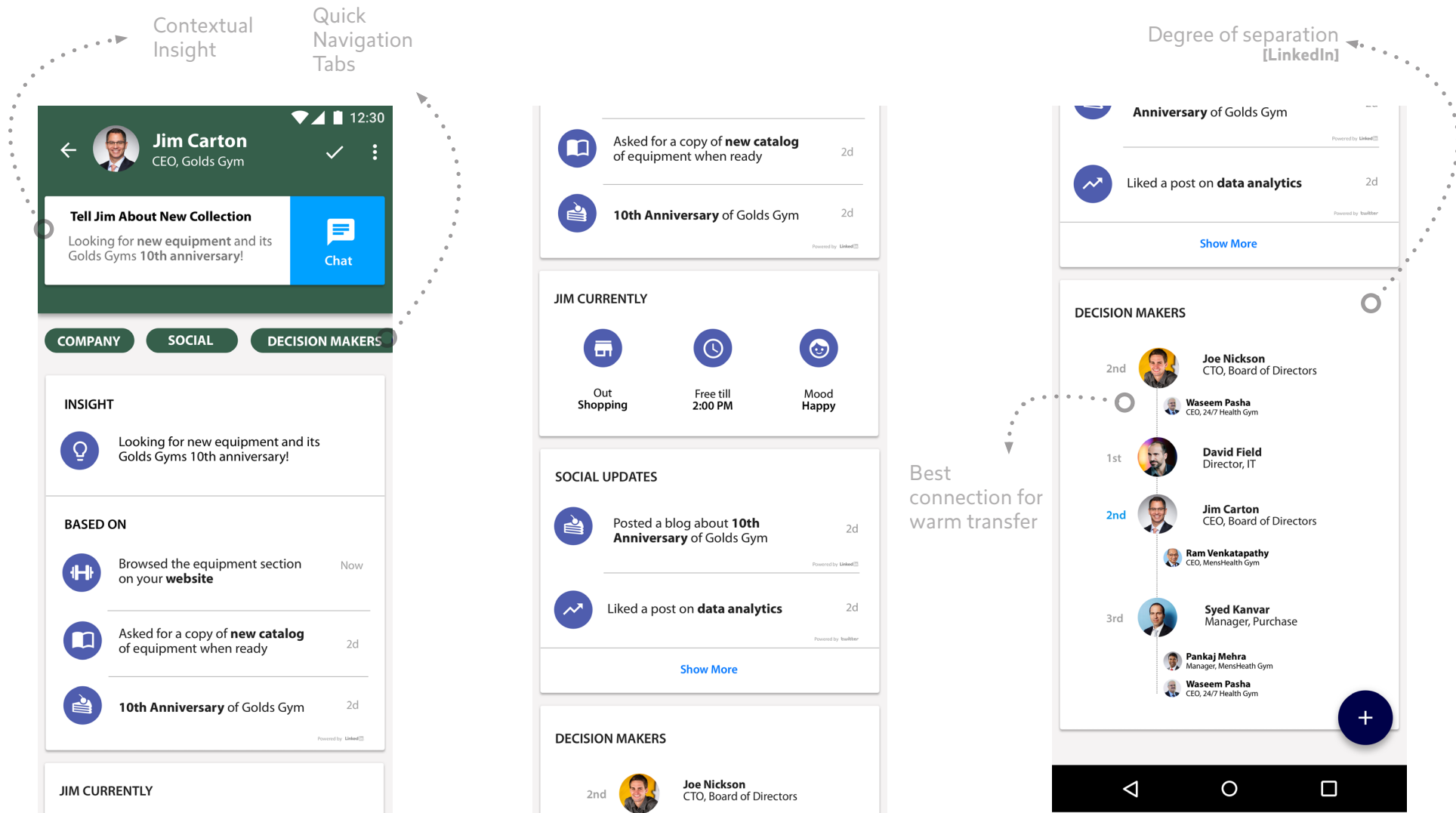
On Tap

Fold



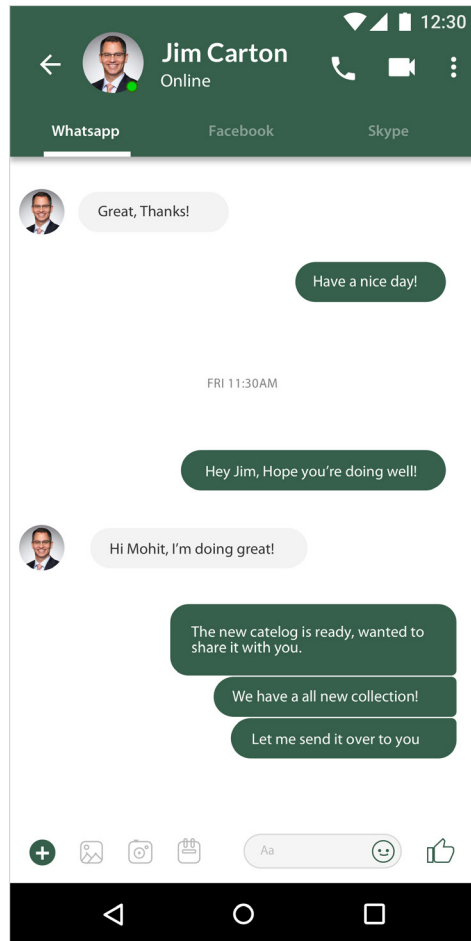
Scenario 2

/ Service : Proactive

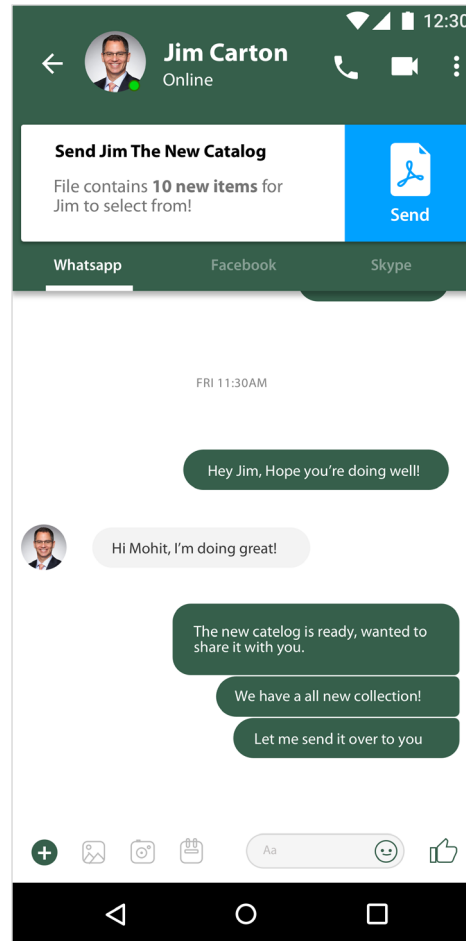


Scenario 2

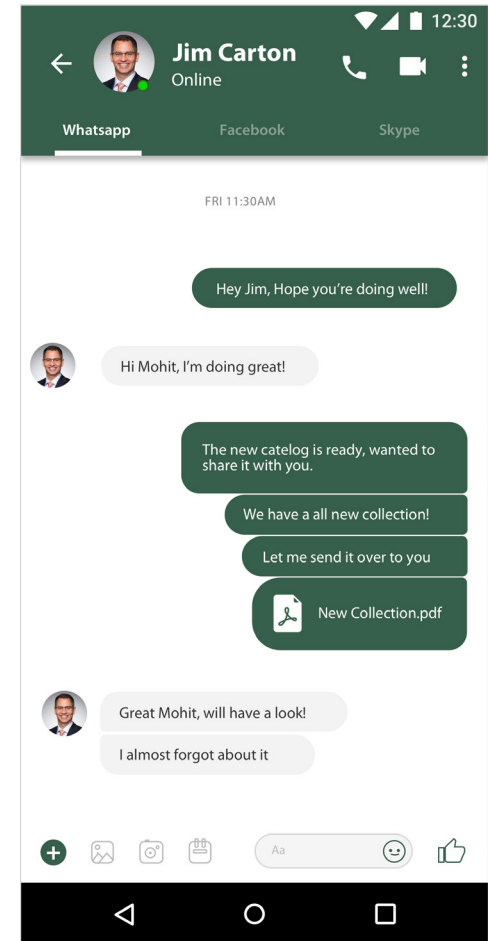
/ Service : Proactive



All IM channels are available in a single window, reducing context switching delays



Euron listens to the conversation and prompts Mohit to attach the new catalog



Jim is happy with Mohits proactiveness and more likely to make the purchase

Scenario - 3

Sales : New Client

Mohit has just finished a meeting on the field and a new client appears on the dashboard.

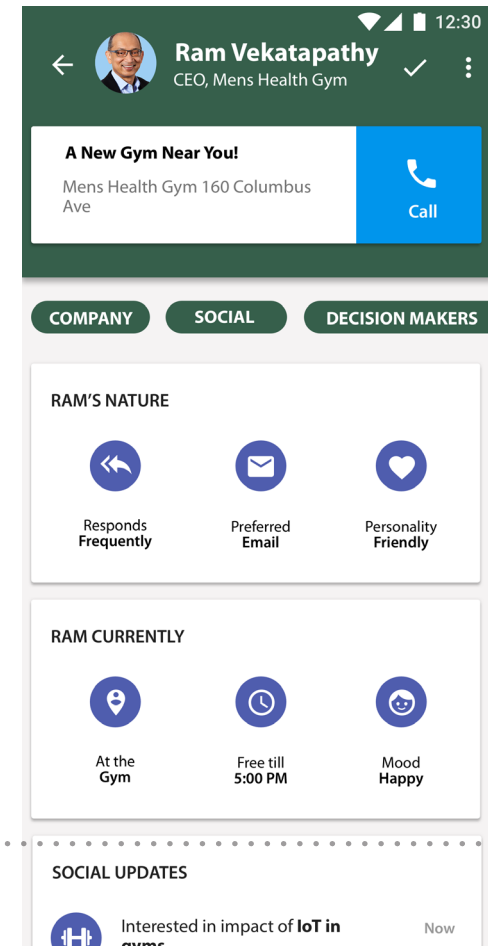
Scenario 3

/ Sales : New Client



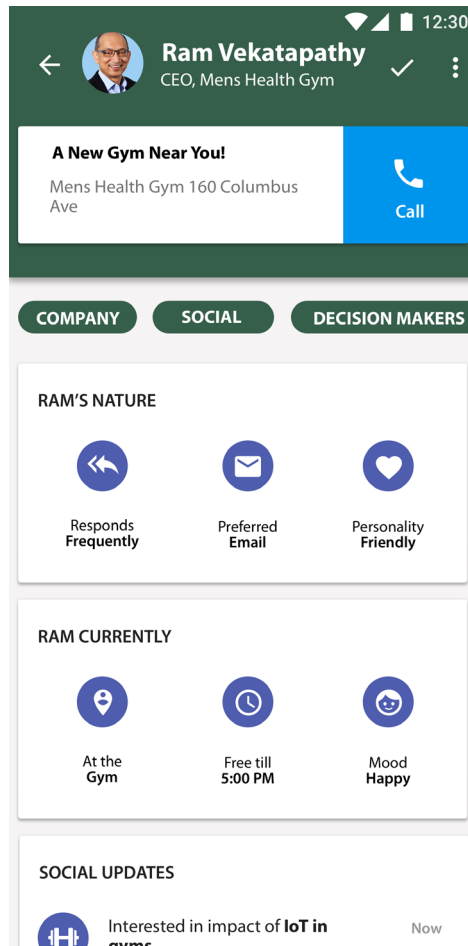
On Tap

Fold

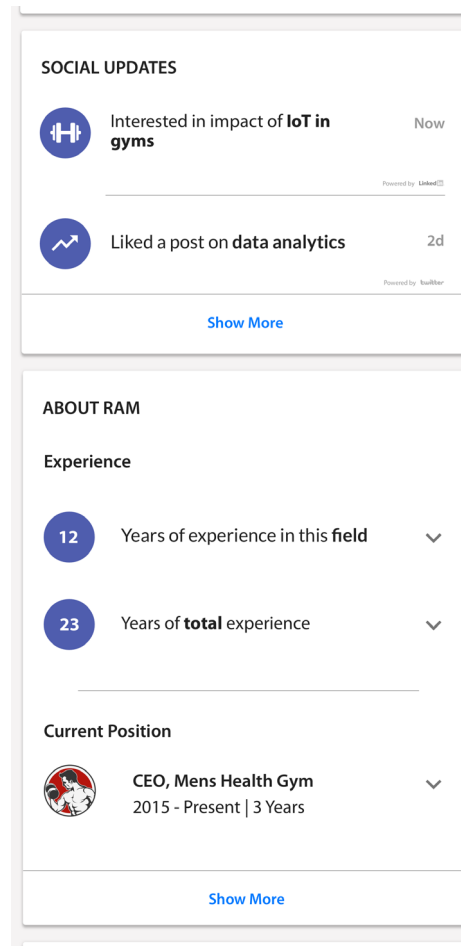


Scenario 3

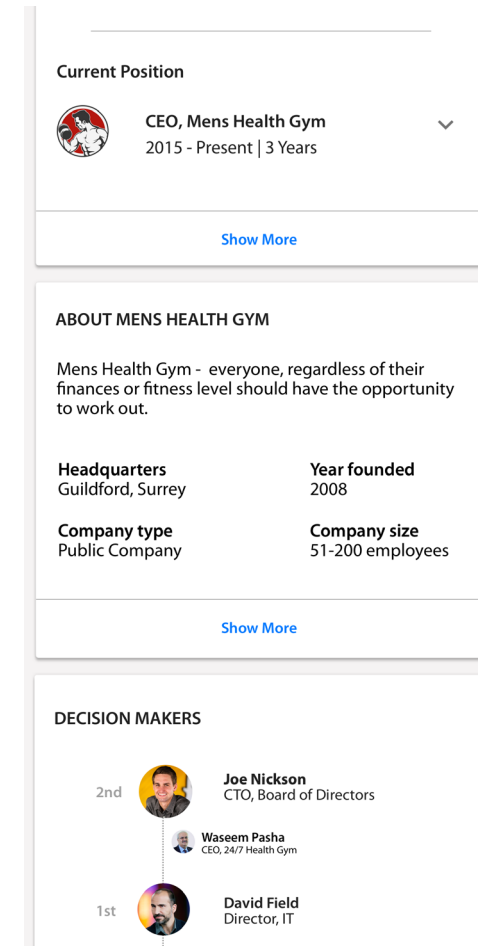
/ Sales : New Client



Euron gets Ram's nature using crowdsourced data from LinkedIn



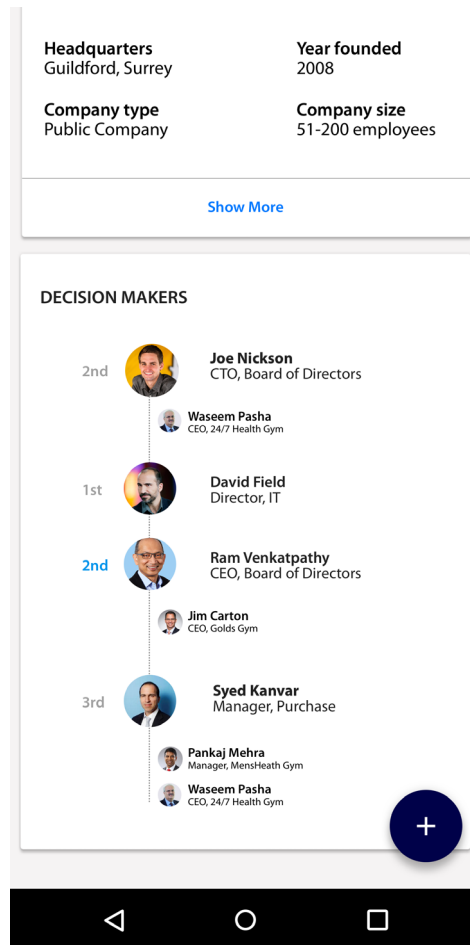
Social updates help Mohit understand what Ram is currently thinking about.



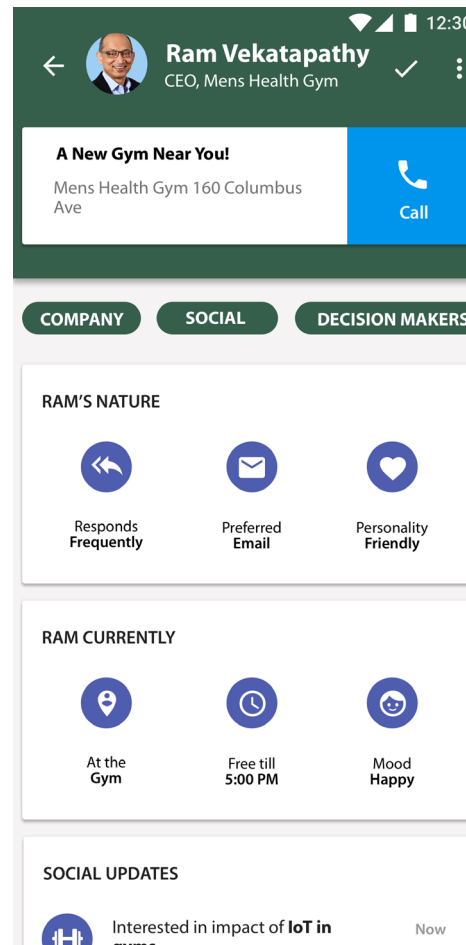
Euron also get relevant information about Ram's experience and about his gym from LinkedIn

Scenario 3

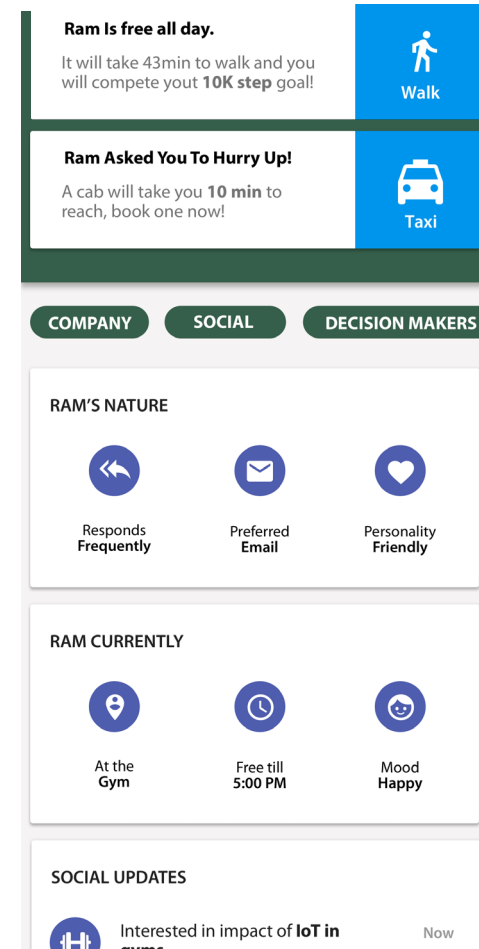
/ Sales : New Client



The org tree helps Mohit understand the decision makers tree and best contact to talk to



Now that Mohit has the context he calls Ram to get a meeting with him



Euron listen to the conversation. It would have asked Mohit to walk but Ram asked him to come fast, prompts to book a cab

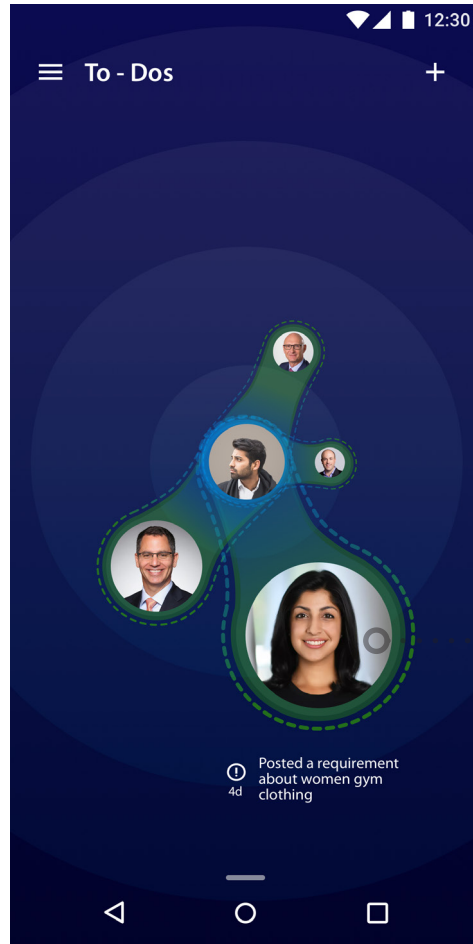
Scenario - 4

Sales : **At a Conference**

Mohit attends conferences regularly to grow his network. Potential clients begin to appear on his dashboard.

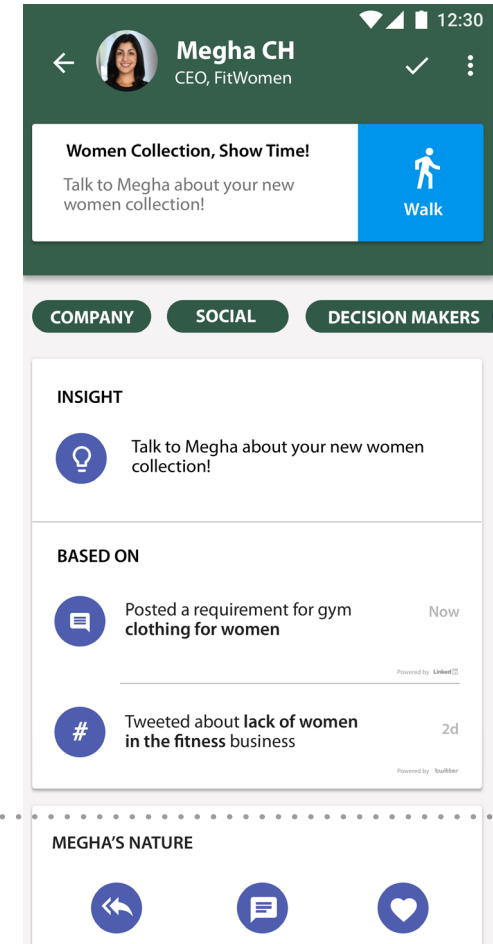
Scenario 4

/ Sales : At a conference



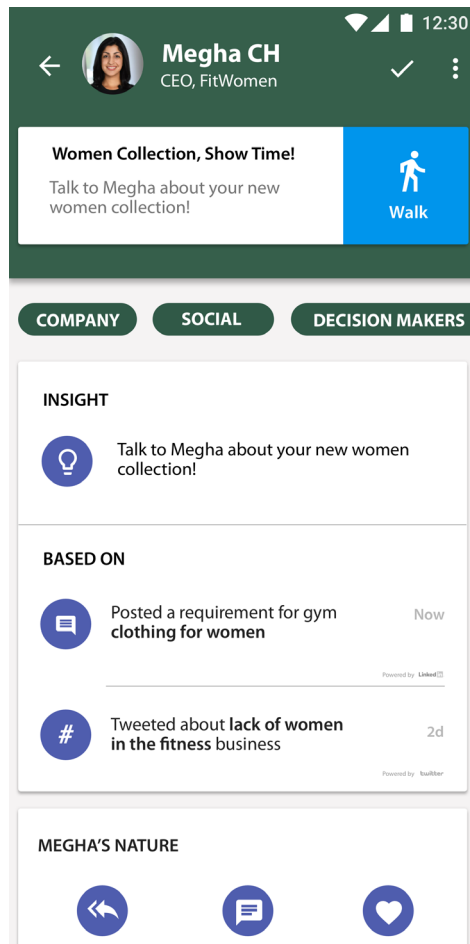
On Tap

Fold

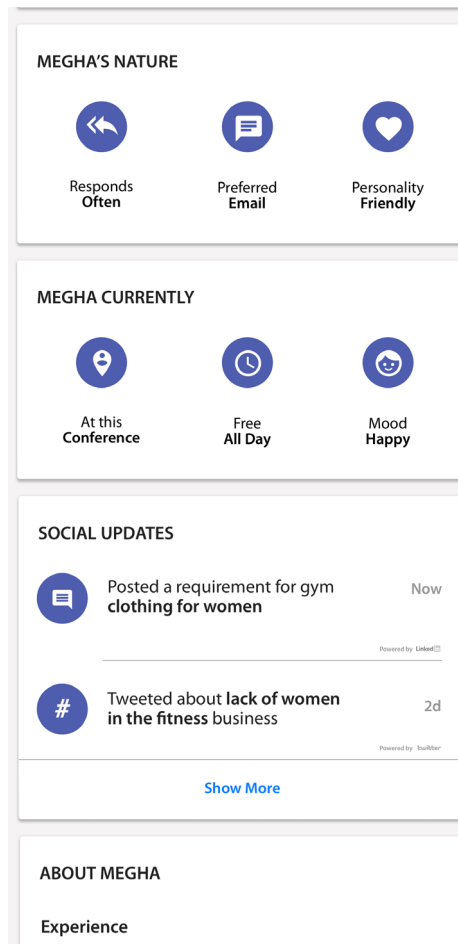


Scenario 4

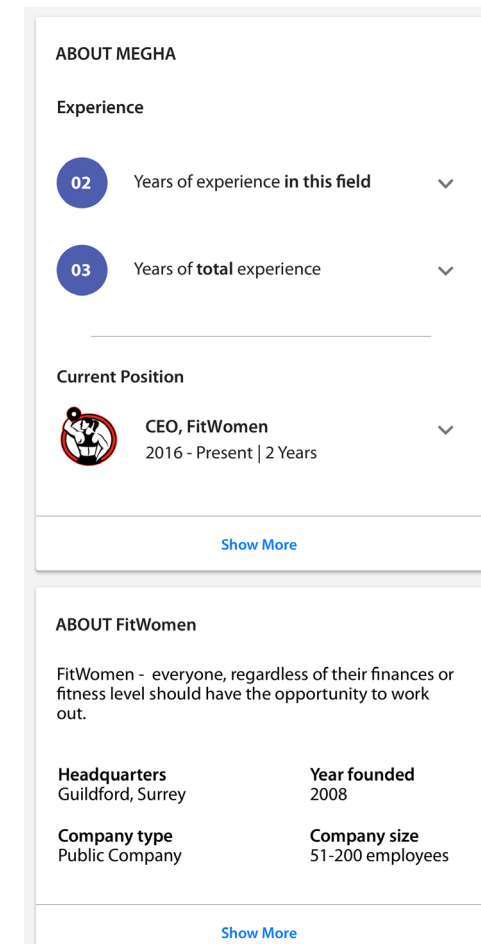
/ Sales : At a conference



Mohit takes a look at the insight details to understand Megha better



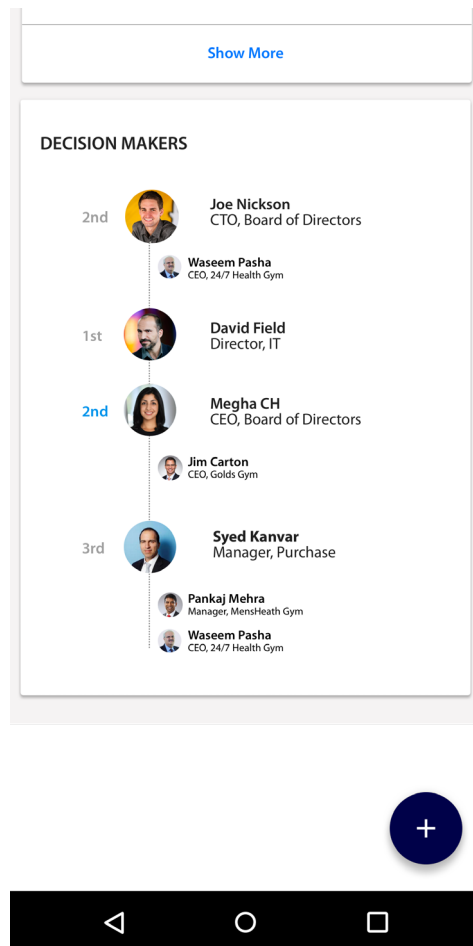
Megha nature is crowdsourced using LinkedIn and her social updates help Mohit understand her ideology better



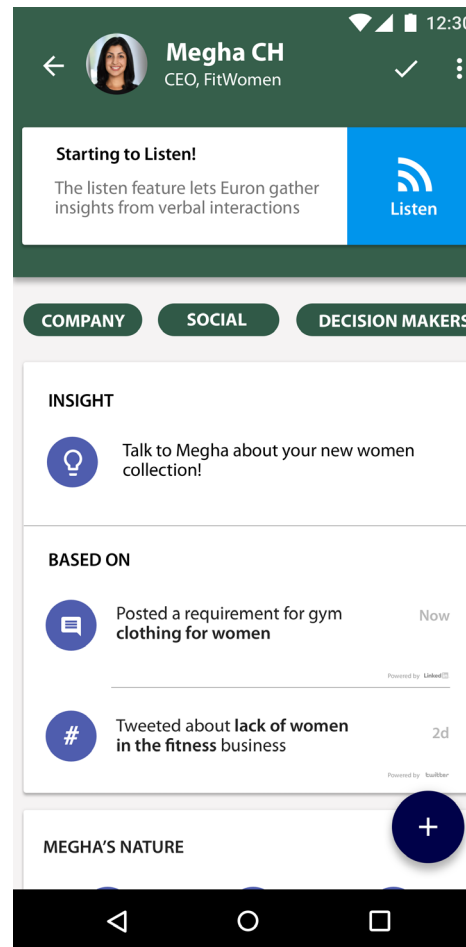
Mohit notices her experience in the field is less and he will need to tailor his pitch accordingly

Scenario 4

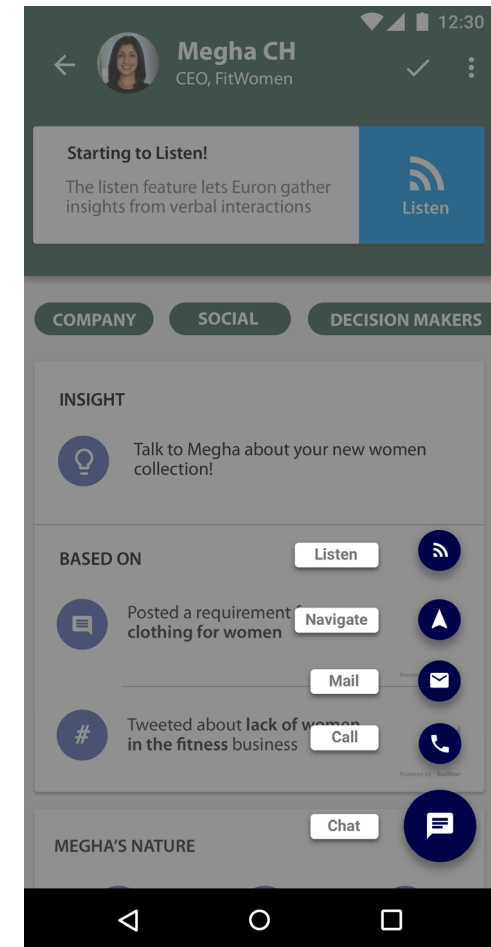
/ Sales : At a conference



Decision makers tree help Mohit understand where Megha stands in her org.



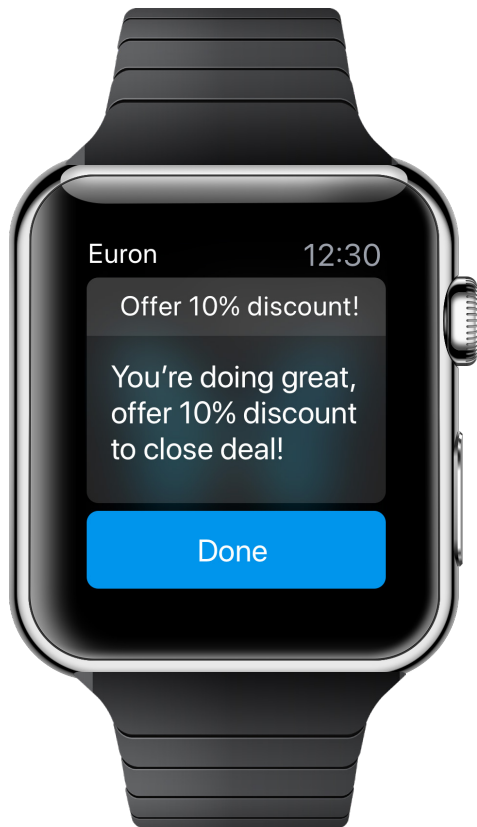
Now that Mohit has context about Megha he goes and pitches to her.



He can enable Euron to listen to their conversations to automatically create reminders and present suggestions.

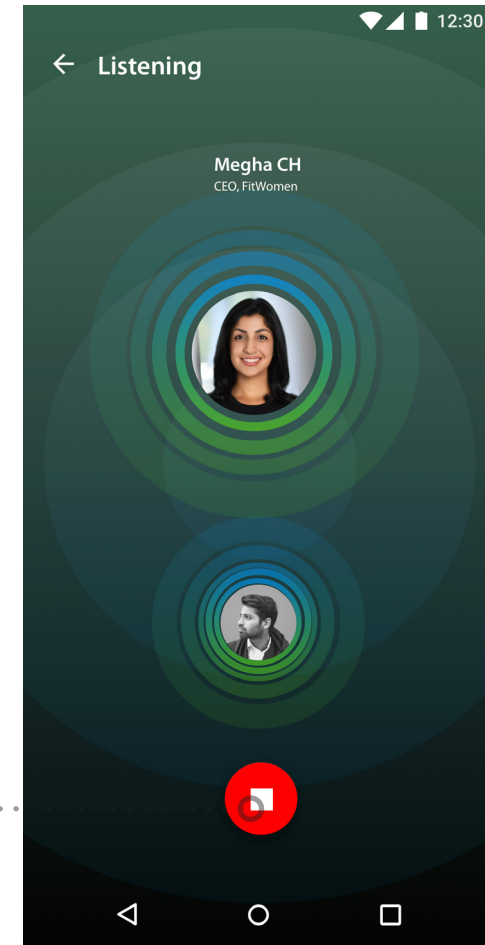
Scenario 4

/ Sales : At a conference



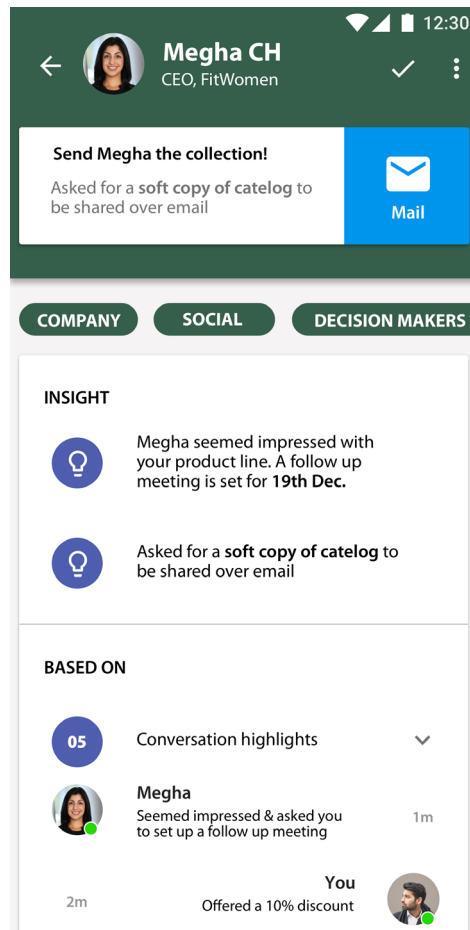
Euron understands when a deal is going great and suggests Mohit to give Megha a 10% discount to get her onboard

Tap to stop listening

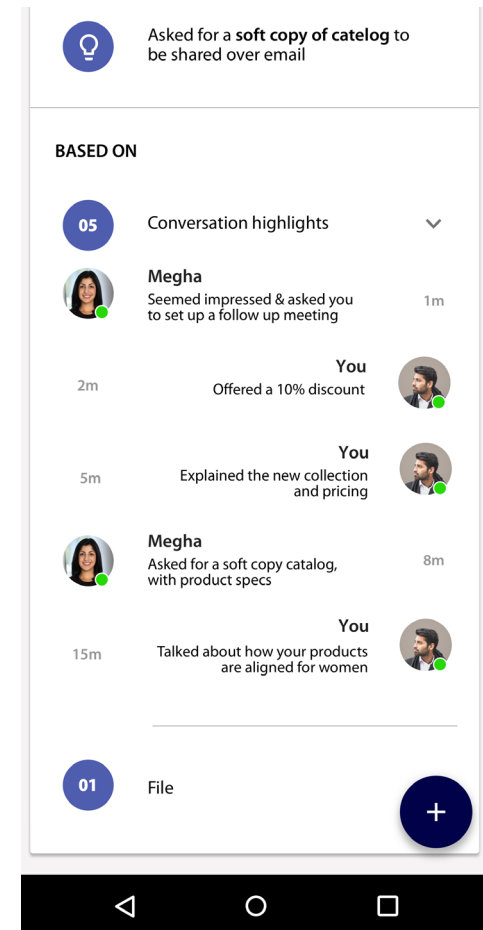


Megha agrees and Mohit turns off the hear feature on Euron.

Scenario 4 / Sales : At a conference



Euron reminds Mohit to send Megha the collection catalog and sets a follow up reminder

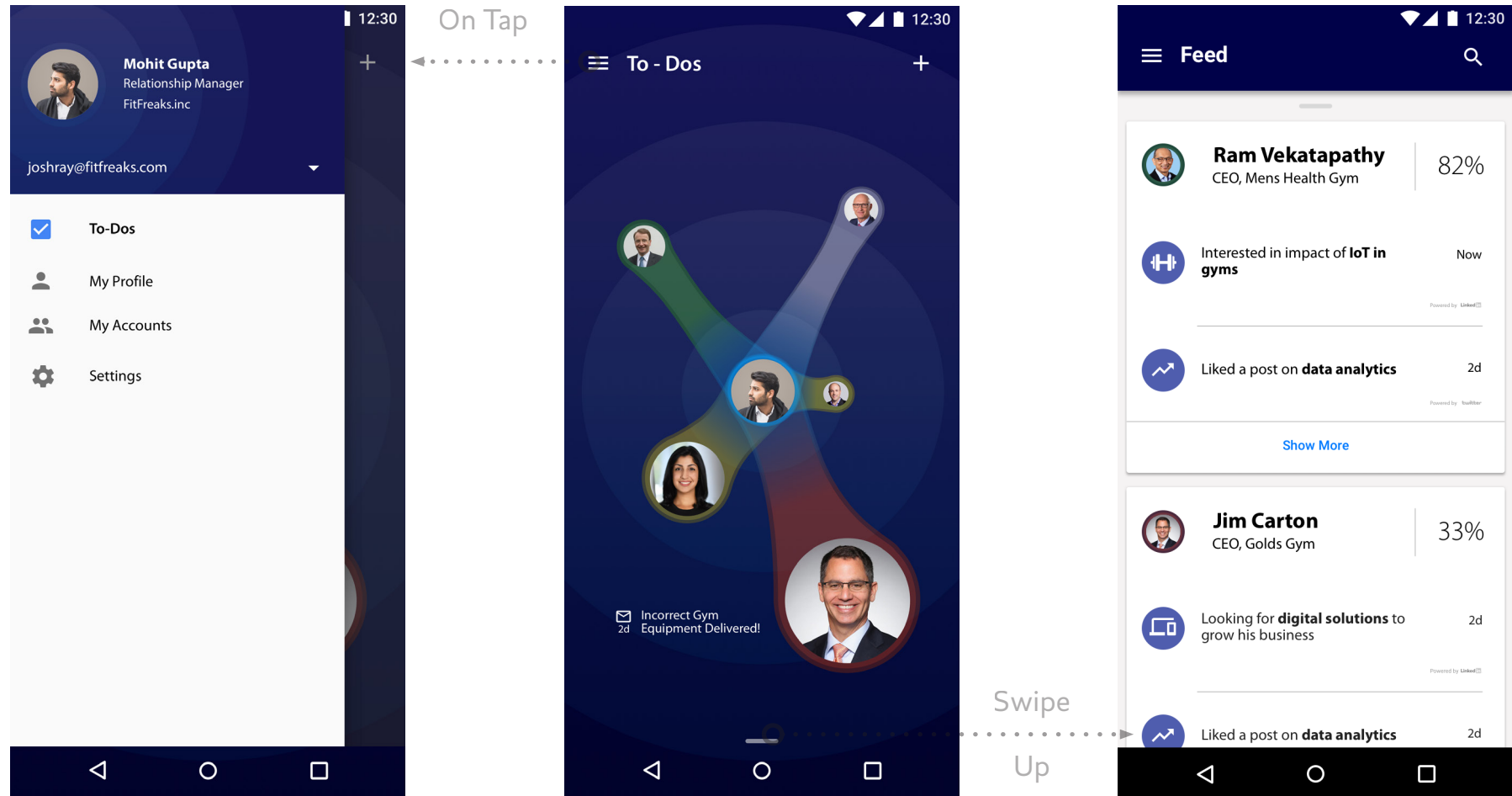


It also provides Mohit with insights/actions taken in their conversation

Dashboard Interactions

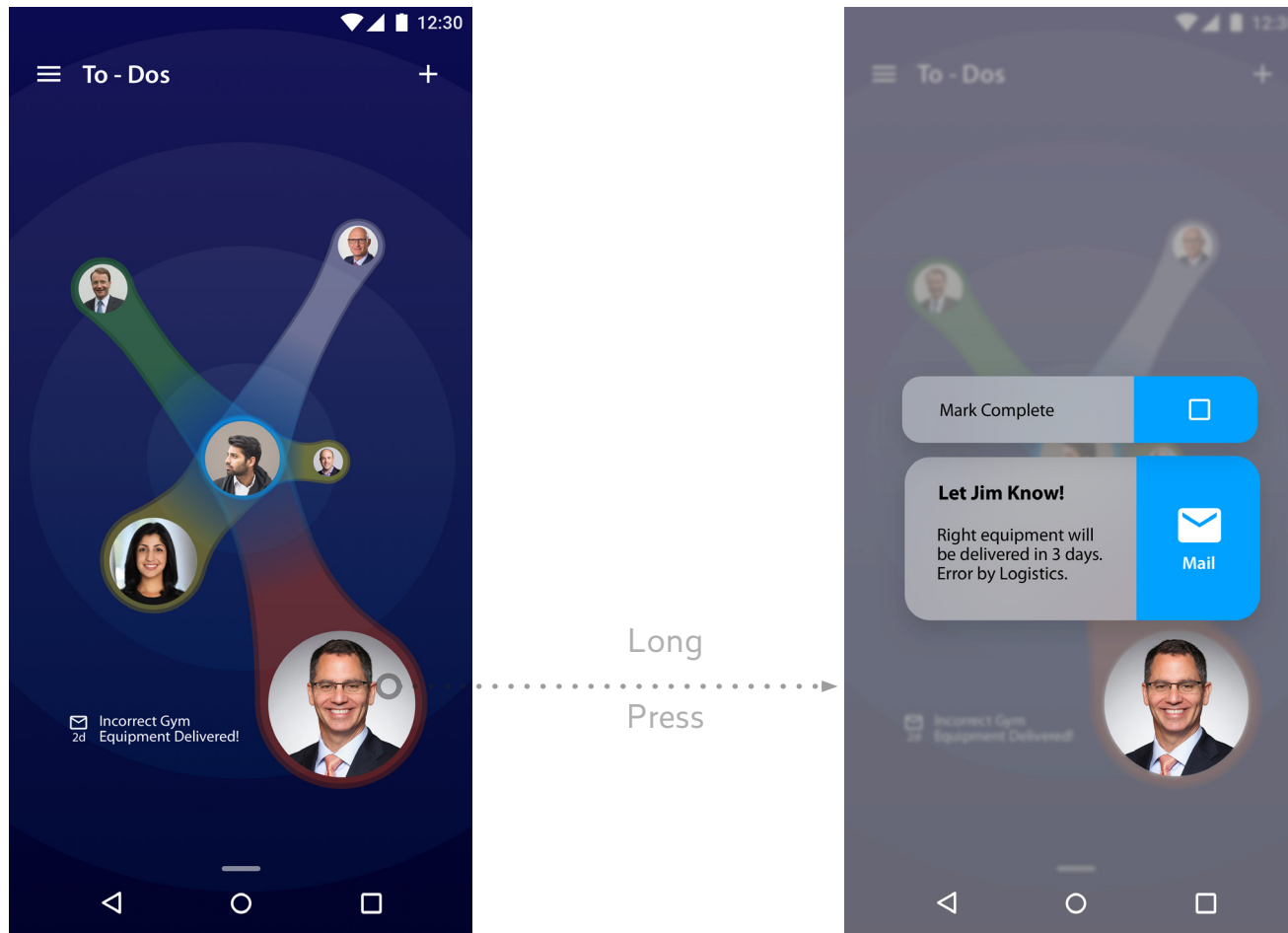
Navigation Drawer & Feed

/Microinteraction



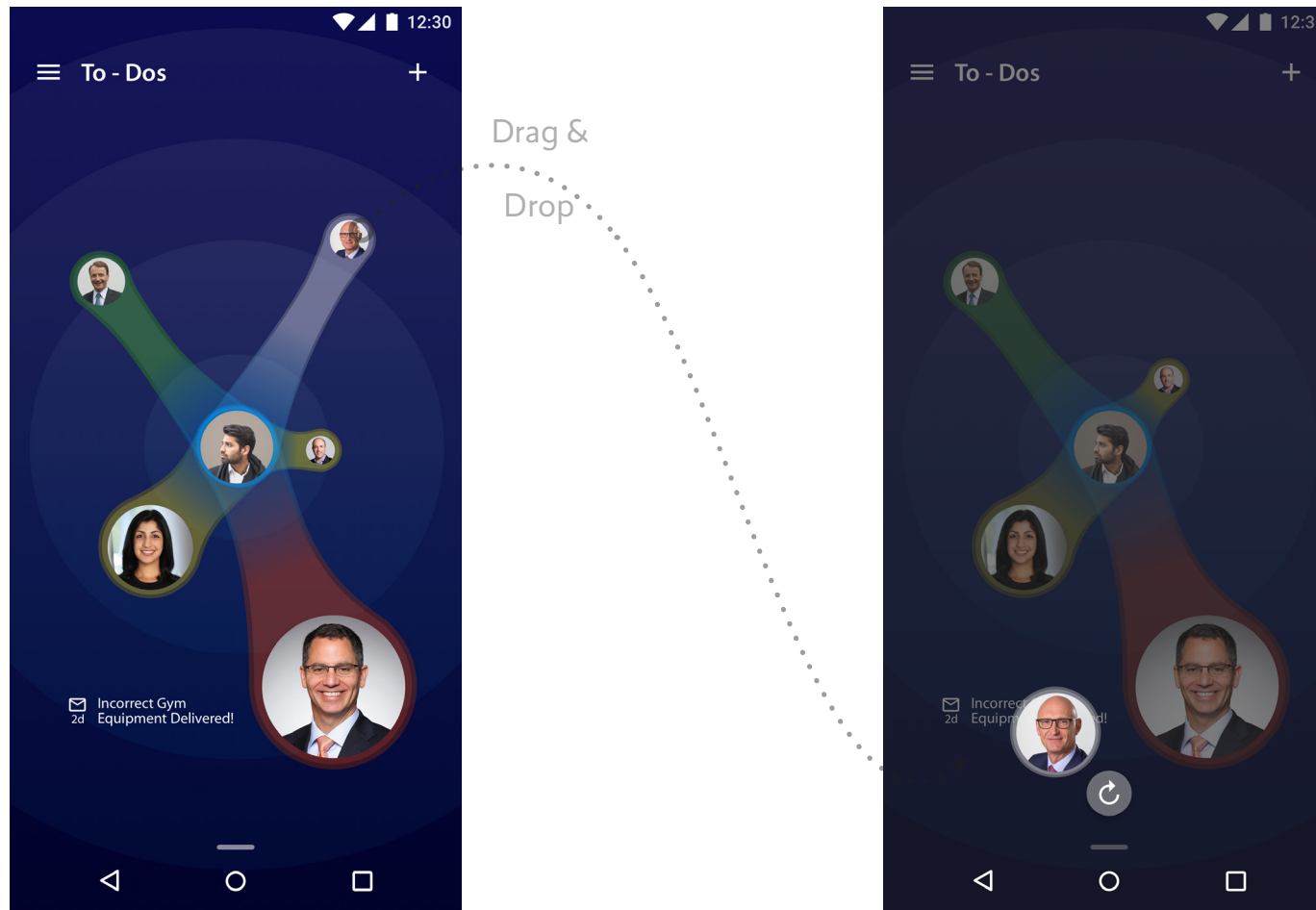
Quick Context Card

/Microinteraction



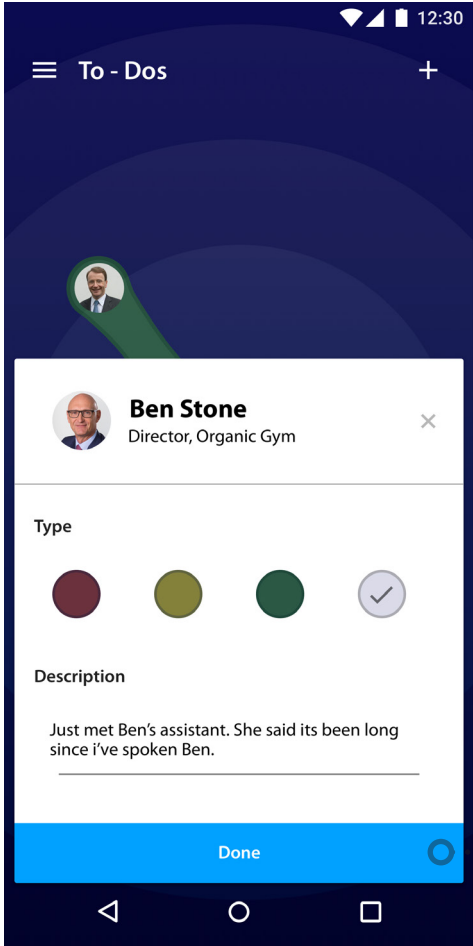
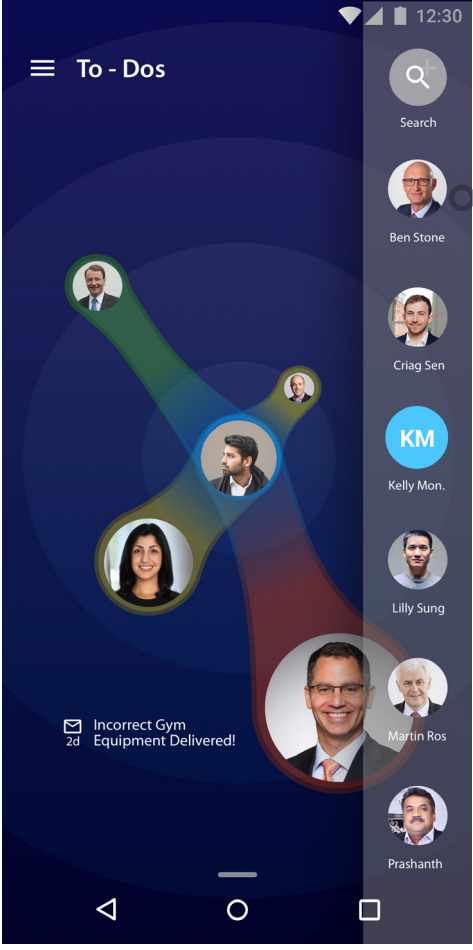
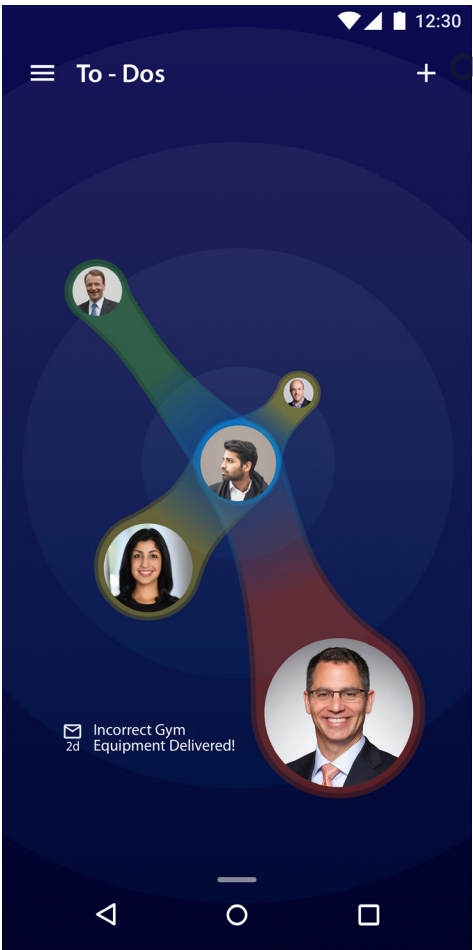
Reschedule a To-Do

/Microinteraction



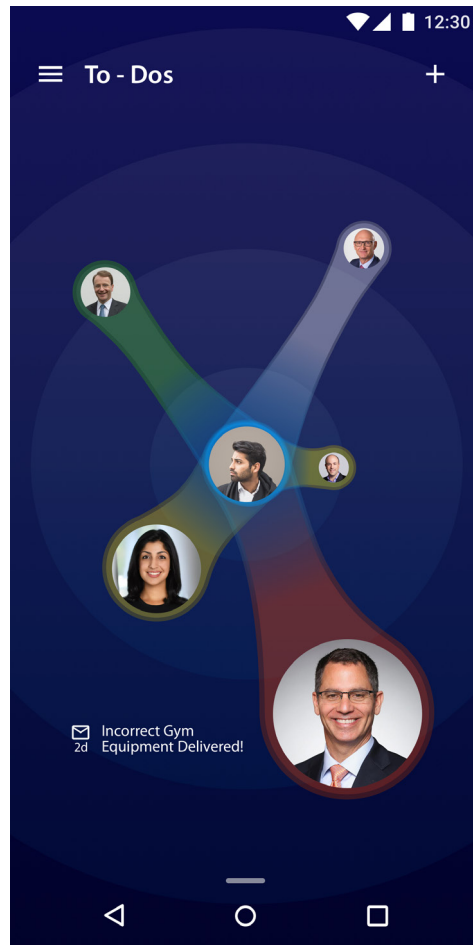
Adding a To-Do

/Microinteraction

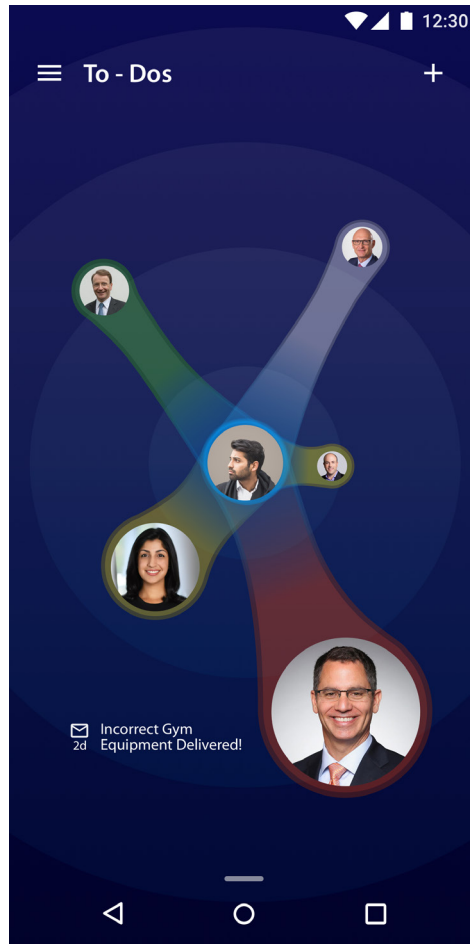


Adding a To-Do

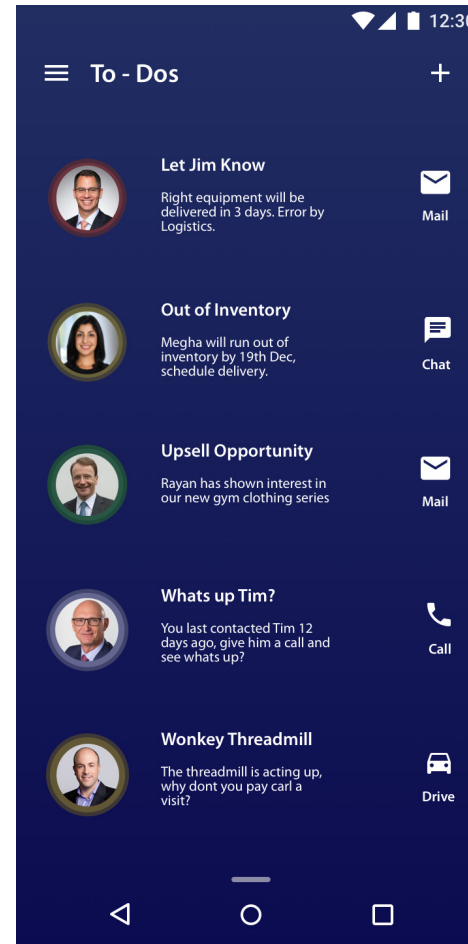
/Microinteraction



Dashboard Views /Microinteraction



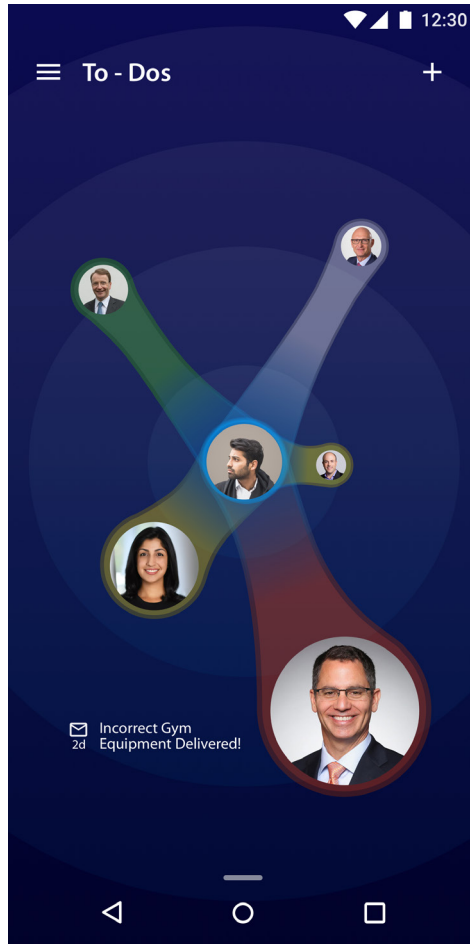
Radial View



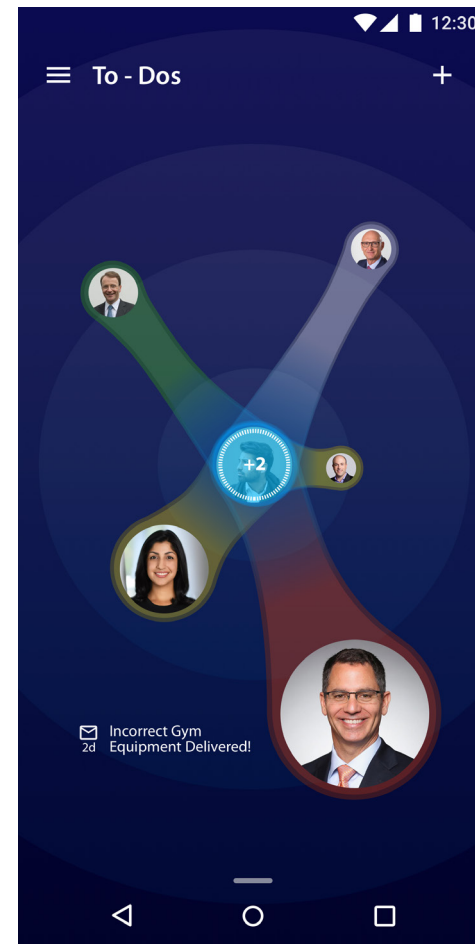
Linear List

Edge case

/Microinteraction



<7 accounts in To-Do



>7 nested list

Conclusion

The complexity of the enterprise domain is both daunting and exciting, during my tenure at Microsoft, working on this project I was exposed to a fraction of this domain and quickly understood that the design principles used in the enterprise domain have a stark differences from that of consumer products principles.

Project Euron only takes a stab at presenting relationship health of the accounts to the relationship manager. It tracks conversations to provide reminders and to-dos so they account are always taken care of to improve the manager - account relationship further it would be important to understand the manager itself and gather data to provide insights not only to improve his relationships but also improve himself/herself and proved custom tailor made learning paths, so the manager can grow, improving the quality of conversations and relationships with his/her accounts.

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