



It's time to look at marketing, sales, and service from a different angle

For anyone working in sales, marketing or customer service, the notion of those three previously distinct departments working together is nothing new. Many businesses have moved, albeit slowly, to bring some level of interaction and unity to the primary 'front office' functions.

KPMG Powered Enterprise | Marketing, Sales and Service

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"The challenge now is how to continuously meet the customers needs"

Lisa Bora
Partner - Customer Advisory
KPMG Australia

Recent global events and the challenges in maintaining ongoing customer loyalty and driving business growth have meant that the previous rules of engagement have been replaced with a new, more customer-centric ways of operating. At one end of the spectrum, marketing, sales and customer service are working cohesively as one interconnected entity. At the other, those three distinct departments are replaced with a new agile 'customer' functions, headed up by a Chief Customer Officers or Centre's of Excellence

The rapid change of customer expectations pre and during Covid-19 meant that businesses needed to accelerate their digital roadmap and provide an integrated omnichannel experience to connect with customers.

Acquisition, channel management, customer engagement and service models have been challenged to work together, as well as the rise of direct to consumer models across industries.

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WHY CUSTOMER CONTEXT IS KEY

Customers demand a lot, and they expect a business to remember every interaction.



Customers expect to have a consistent, high-quality experience across every touchpoint. They are not concerned with how a business is structured, the challenges of internal processes or non-connected tech and data-based insights. Customers expect each unique interaction to maintain the context of what has been already experienced in previous encounters, and rightly so. The challenge is how to continuously meet their needs.

Whilst organisations have responded to varying degrees, there are still significant internal silos between marketing, sales and service and/ or inadequate investments. Regardless of size, nationally there are large or small businesses whose sales teams don't have detailed customer record, marketing teams not across detailed channel performance and services teams unable to access sales histories, nor customers' prior interactions to deliver personalised and high-quality service

While marketing, sales and service have their own responsibilities, the customer crossover is significant, and they can no longer be viewed as functional silos in any way. There is an opportunity for today's forward-thinking marketing, sales and service leaders to gain considerable competitive advantage by taking a unified operational approach to achieve and sustain their success.

Delivering on a digital roadmap with an integrated experience is possible when you align that to your customer needs. That means businesses need to think about their customer not by department or campaign. "Taking a customer view considering process, measurement, and data and how that is consistent at each customer touch point is key. Focusing on process and technology-based enablers provides a blueprint to do that" says Alex Moreno, Partner, Technology Practice Leader at KPMG.

The foundation context to enable this is to ensure an organisational commitment and focus in establishing a single view of the customer is created from multiple sources of information across the business. Better access to data stores, integration to core systems, and other aforementioned aspects lead to overall greater alignment. If organisations cannot provide this, competitors will, and as a result take share and delight customers.

Businesses can also become more efficient and effective through collaboration, ultimately increasing revenue, and decreasing costs, whilst delivering the memorable experience new and recurring customers expect.

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Partner

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TURNING OBSTACLES INTO OPPORTUNITIES

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From the outside, bringing customer knowledge and insights together within a business may seem a simple task. In reality, it is often an operational challenge for businesses due to the siloed systems, processes, structure, and technological infrastructure currently in place. The CMO and CIO relationship is becoming increasingly critical to make sure all the pieces fit together in a way that benefits the entire enterprise now and into the future.

The challenge for businesses is how to stitch together their understanding of who the customer is, to deliver the most valuable content, support, interaction, or handling based on whatever situation the customer finds themselves in at that moment. That involves collating processes, data, metrics and the customer journey into one business-wide technology. By rationalising and centralising customer information and insights across the business, the organisation can gain a significant advantage as it strives to deliver exceptional customer experience.

“We call this being a best in class Powered Enterprise – one that brings Marketing, Sales and Service together with business processes and technology” says Lisa Bora. This blueprint is a scalable and ready to use industry based new way of working – with customer experience front and centre.

Central to a Powered Marketing, Sales and Service transformation is creating and integrated customer centric experience. Optimising marketing, sales and service needs to be a fluid process, and when working in this cross-functional manner, regardless of official structure, effective governance becomes most critical.

Strong ownership is required for every function, from onboarding to the end-of-customer lifecycle. By offering an integrated, customer-centric experience, upsell and cross-sell opportunities can be realised contributing to customer personalisation and enabling business growth

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Within Powered Enterprise | Marketing, Sales and Service, how customers interact with a business can be defined across three areas:

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- **Target to lead:** This encompasses everything in the process, from brand recognition and communicating your key value propositions to attracting new customers and transforming them into qualified leads.
 - **Prospect to enquire:** This is the 'sales' element of the journey, enabling meaningful conversations with potential customers, qualifying and proposing the right solutions, services and products, before converting them into customers.
 - **Sustain to retain:** How do you look after your customers through customer service and a consistent experience at every point of contact to turn them into loyal, repeat customers, even brand advocates?
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IT'S NEVER JUST ABOUT IMPLEMENTING A CRM



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Organisations that fail to automate their processes place themselves in a position of significant disadvantage. Business' CRMs should be highly responsive, and customer driven but they are just the foundation. The business processes beyond CRM that work alongside are critical to review, automate, integrate or in fact remove interactions. At each customer interaction organisations should have rules, automated processes and communications set up so they can provide the best experience back to the customer.

Ensuring that CRM based investments are seen as critical business foundations is key. Many organisations however invest, implement but often don't extract full business value.

There is a plethora of reasons why organisations' sales teams may not value the CRM platform, such as a focus on reporting and compliance, the lack of perceived added value to sales pursuits, a lack of training, misalignment between technology and sales process, focusing on KPIs that breed the wrong culture. Similar constraints also exist within marketing teams, where CRM is only one component to delivering on personalised brand, communication and customer acquisition and retention strategies and tools.

Businesses need to consider the following:

- CRM is not used as a compliance tool, but one as a great aid to sales, service and marketing
- Where Poor UX is evident – cumbersome to use and misaligned with sales processes or ways of working, e.g., lack of remote/mobile access ease; limitations in customer segmentation deployed
- Poor integration between data sets inhouse and 3rd party and adjacent sales tools such as CPO and other pricing enablers
- Failing to address legacy processes and ways of working e.g., maintaining existing manual/offline reporting requirements
- Limited leadership sponsorship and championing towards a single source of truth in customer data and sales pipeline
- Understanding the scale of behaviour change required and necessary investment in change management.

A POWERED UP SALES OPERATING MODEL



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Customer Data, CRM technology, effective sales processes and dynamic pipeline management are key ingredients for a future fit sales operating model. Understanding your customers, historical and current sales results are important, but ensuring you are focused on the health of their sales pipeline is critical.

Determining the different stages in the sales funnel, alignment to the purchase journey and ensuring consistent and complete data sets, i.e., segments, pipeline stage, deal size, price, source of sale are key.

Keeping track of key metrics indicate the level of performance (sales, revenue, margin by region, channel, sales rep, product) and effectiveness (conversion at each stage of the funnel, number of deferred purchases, average length of sales cycles of your sales). "Leveraging this current pipeline data against historical trends, looking at factors such as deal size variation and recycled opportunities. These are all key for what a future fit sales team all operating with a single source of reporting and operational cadence" says Richard Large, Director at KPMG.

Insights into your pipeline data allows you to look at historical trends, deal size variation and recycled opportunities so you can make informed decisions about where to focus your efforts.

"Understanding your customers, historical and current sales results are important, but ensuring as an organisation you are focused on the health of their sales pipeline is critical."

Richard Large

Director, Customer Advisory
KPMG

A POWERED UP AND PERSONALISATION FOCUSED MARKETING TEAM

Defining execution and strategy as separate entities
is essential for better and more efficient marketing.



There must be a re-focus for organisations to master their marketing cloud so that they can execute their marketing initiatives in the best way possible. If not, organisations put themselves at the risk of dedicating too much time to channel-specific content pushed out without an omnichannel or segmentation based approach.

“Creating dynamic templates that can automatically integrate content and be distributed to a targeted, segmented audience based on data led insights is critical. CRM alongside your overall mar-tech stack are key enablers for this to be realised” says Justin Gurney, Director at KPMG

Dynamic and fluid customer segmentation is also key. Traditional segmentation techniques are now replaced with interaction and sales based insight to inform micro segmentation of an organisations customers – all based on their previous sales, engagement history and motivation and preference triggers.

When aligning powered up sales and marketing processes improved outcomes will be experienced by an organisation including:

- Clarity of roles and responsibilities in the Marketing and Sales funnel
- The alignment on definitions of qualified leads
- Joint pipeline reviews/integrated sales and marketing initiatives and metrics of success
- Co-location of marketers/salespeople and secondments/cross-functional job assignments
- Sales involvement in the development of the marketing plan and campaigns
- Implementing feedback loops to improve lead quality and campaign performance
- Integration of marketing automation/lead generation systems into CRM
- Automated routing of leads/lead scoring for prioritisation of sales effort

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Justin Gurney

Director, Customer Advisory
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Powered and Proactive Service

AI is increasingly being utilised by best-in-class leaders in the Powered Marketing, Sales and Service space, to enable increased efficiency and accuracy of customers' needs and wants.

Scaling services through AI not only reduces cost, but also allows agents to focus on the moments that matter. AI can be substituted for repetitive tasks, enabling humans to focus on meaningful interactions that create value, such as personalisation and loyalty. "Investing in this technology will help to strip back labour costs, generate customer data, improve resolution times and contribute to freeing up agents for impactful interactions that drive value" says Ming Lee, Associate Director KPMG

Proactive service at large will enable organisations the ability to solve problems before they become problems. Proactive service can lead to cross-sell and upsell opportunities that increases customer lifetime value. Successful customer onboarding during the sales process can reduce the number of service requests or complaints during the length of the customer relationship.

IN SUMMARY

1. Sales, marketing, and service cannot operate as silos any longer.
 2. Customers expect consistent, high-quality experiences, regardless of which function they are dealing with.
 3. Many businesses recognise the importance of a chief customer officer role to lead the previously standalone marketing, sales and service functions.
 4. A single source of truth, accessible by every function, is needed for servicing each customer.service functions.
 5. This alongside enhanced processes and technology is critically important to facilitate and inform customer experience decision-making.
 6. Strong governance, role clarity are equally critical enables
7. Are you future fit and powered across your sales, marketing and service functions? Have you compared your organisation approach against KPMG's leading practice by industry across these 3 critical; stages
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