A KelCor Thought Leadership Report

Data Driven Customer Engagement

When Industry-Leading Real-Time Communication and Data Analytics Tools are Integrated with the Contact Center, Evolutionary and Transformational Customer Interaction Occurs

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Executive Summary

The customer journey consists of a series of interactions and transactions, which in the long term allows enterprises to develop and maintain a comprehensive end-to-end view of how the customer experiences the company and how the company can better serve the customer. However, developing a consistent view of this journey is challenging because it involves tracking and correlating customer interactions, even when customers use multiple engagement channels to satisfy a particular need. To deliver a superior, frictionless experience, a company must facilitate continuity between channels throughout the journey, using data driven engagement models to fulfill the customer's needs, while simultaneously generating the most value for the company.

In this paper, we discuss the convergence of data and analytics, real-time communications, and the contact center, describing the impact such convergence is beginning to have on how companies engage with their customers and how customers engage with their preferred brands. We describe a framework for mediated customer engagement and articulate how multichannel, rich-media customer interactions aided by data and analytics are changing how companies view their customers and how they provide differentiated levels of customer service based on a customer's context, attributes, value, and intent. We provide an architecture for data driven customer engagement and conclude by illustrating how two companies, CaféX and Humanify, have aligned themselves to provide this type of real-time, analytics-driven customer engagement solution.

A Framework for Mediated Customer Engagement

When considering how to engage with customers, knowing a customer's intent, context, attributes and the value that customer brings to an organization is critical. By knowing these few key pieces of information, the enterprise can determine 1) how to satisfy the customer intent most profitably, and 2) which interaction channels and resources should be made available to do so.

This capability is called "mediated customer engagement". Some primitive forms of mediated customer engagement have been around for a long time, particularly automated call distributors (ACD) and interactive voice response (IVR) systems. These systems are used to try to find out what a customer may need and route the customer to "the best available agent" to serve his or her needs. But, people generally dislike these systems. Because of how they are implemented, customers have had too many bad experiences being routed to a "clueless" agent after investing their time navigating a series of menus and voice prompts.

Some organizations are trying to mitigate the situation by adding multi-channel contact centers, given that a customer may engage via a range of interaction options, including text chat, email, phone, and sometimes even social networking channels. This multi-channel approach can be good, but unfortunately, in many organizations, the intent and context behind the customer journey are often lost in a sequence of disjointed touch points. Customers can discern very quickly whether a business knows them or not, and integrating these interaction points, whether it is web browsing, using a mobile app, text chat, CRM data, sentiment analysis, social networking comments, or customer value, is becoming necessary and important. Unfortunately, stitching the siloes together to gain any real end-to-end customer context and insight often proves elusive.

But it doesn't have to remain this way.

Given the capabilities now available for data collection and analytics, along with "the webification of communications[1]", leading companies are considering how to better integrate the "big data" they collect with analytical models, individual and aggregate customer behavior, the contact center, and their real-time communications capabilities. Creating this aggregation and the underlying systems to power it enables a new model for mediated customer engagement.

The Data Driven Engagement Paradigm

This new model is both a philosophy and a set of tightly integrated business systems that enable organizations to use predictive analytics and data to determine both the context and the intent behind customers interactions in real time, whether initiated by the customer or by the organization, and then bring customers and resources together across multichannel engagement systems without losing an understanding of what the customer wants.

Sample Use Case

Perhaps an example scenario will help readers visualize a data driven, mediated customer engagement solution.

> Greg, a high-value customer, uses his mobile app, the Web, and his mobile phone to interact with GreatBank, his banking and investments provider. On a Friday afternoon, Greg is reading about some changes in the market and wants to talk to GreatBank. He pulls out his phone and opens the GreatBank mobile app. The app identifies Greg to a data analysis engine linked to GreatBank's CRM and data-warehousing systems, which quickly retrieve Greg's account information, his browsing history on their website, his purchase history, his preferred agent, even his recent Tweets and social clout score. The app also tells the system which screen in the app Greg is currently looking at. The system lights up different engagement channels in the app based on Greg's profile, and he is given a choice of channels through which to engage GreatBank: voice or video chat (directly from within the app), text chat, common questions database, or an email-like portal for submitting a message.
>
> He checks his account balances quickly, and then Greg wants to talk to someone – someone who knows his "context". So, he selects voice chat from the current page within the app and a voice over IP voice call is automatically launched. Joan, his preferred agent, is not available so the matching engine routes his call to James, who the system judges to have similar attributes with Joan and some attribute compatibility with Greg. Even though James hasn't spoken with Greg before, the agent portal gives James plenty of information, including the page he is looking at in the app and the information to both answer Greg's questions and offer potential up-selling services that are really a great fit for Greg. After the call and sale, Greg tweets about his great experience to all his followers.

Now, consider what this advanced analytics and communications engine has done, both for Greg and for GreatBank. The app identified Greg to a database that retrieved information on dozens of touch points collected across various interaction channels. The system knew Greg through the app, but it likewise knows him through his phone number and his website login. The system gave him differentiated engagement options because of its awareness of his high-value to the bank, and then routed him quickly to the best possible agent, who was matched based not just on skills, but on attributes as well. Then, the system gave the agent key information about Greg and what page he was looking at in the banking app, produced by intelligent data processing, to help Greg get quickly to the point if his inquiry.

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[1] See the article by Phil Edholm titled, "Webified Communications: a Matter of When, Not If", on NoJitter.com.

At the center of this data driven system is an analytics engine and web communications capabilities, both of which are integrated with the contact center. The data analytics engine can follow Greg through the multiple engagement channels and touch points, not losing context, while the communications engine enables real-time communications from within the context of what Greg was doing in the mobile app.

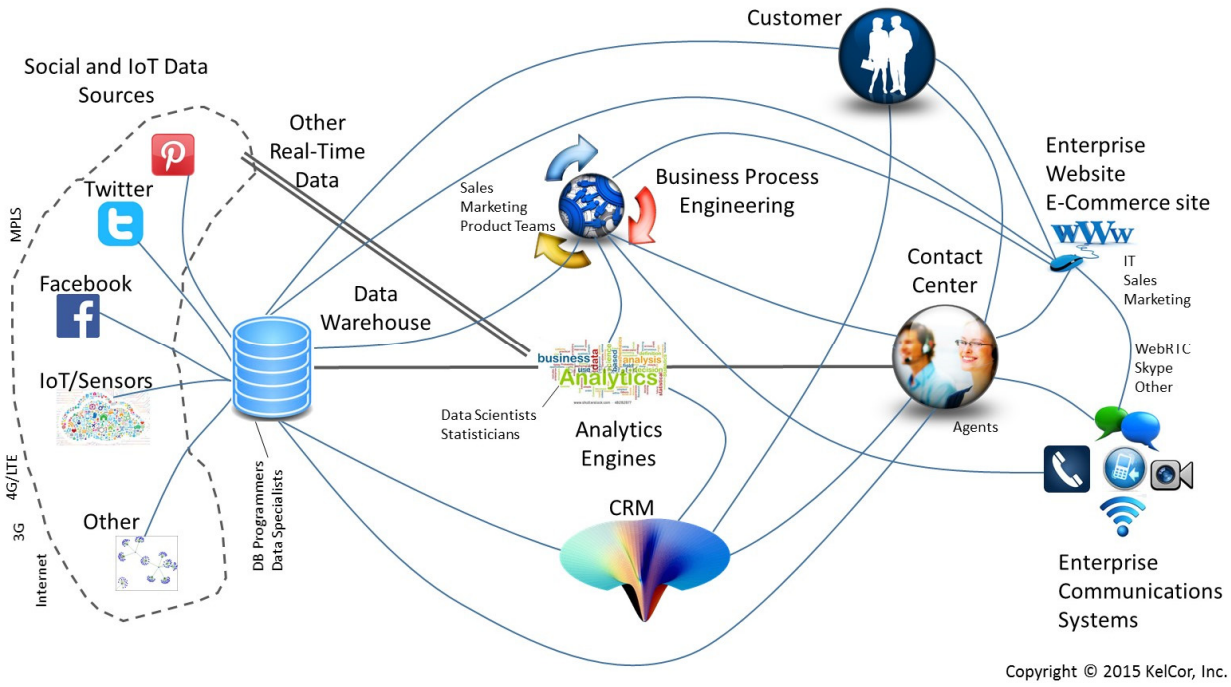

Figure 1. Data sources, business systems, and web-enabled communications capabilities that can be integrated with contact centers to build next generation mediated customer engagement solutions.

A data driven mediated customer engagement system opens up a vast array of new possibilities for organizations. It allows companies to consider how to take advantage of and integrate data from a multitude of sources, including the Internet of Things (IoT), bread crumbs left from Internet browsing sessions, buying habits gleaned from online purchases and search terms, and direct interactions with an organization. All of these, when combined with context, create a new and more complete view of the customer. Simultaneously, customers are expecting the companies they do business with to know them and their attributes and buying patterns and to reduce the friction involved when interacting with them. These new, smart, mediated customer engagement solutions, coupled with smart, connected products and services, data analytics systems, and communications capabilities will give rise to the next era of organizational growth, productivity, and brand loyalty at a time when the impact of earlier customer engagement systems has largely played itself out[2].

Using Data to Determine Customer Context, Attributes, Value, and Intent

Smart companies with smart connected systems are transforming how they compete. These companies can correctly prioritize the actions they should take given the expanding array of "triggers" occurring within the huge volume of customer data available to them. Customer "triggers" may include website

[2] Some of the thinking in this paragraph comes from the article titled, "Managing the Internet of Things" by Michael E. Porter and James E. Heppelmann in the Harvard Business Review, November 2014 issue.

visits, mobile app usage, location services, sensors (machine-to-machine and IoT), social media, and direct interactions through a purchase, contact center, or other direct contact means. These triggers can be used to determine the kind of immediate transaction they should engage in with a particular customer. Triggers can also be aggregated into a customer journey map[3], which business analytics tools can identify, and which marketers, product managers, and sales teams can then transform into business logic and rules. These rules and logic can then be fed into customer engagement strategies and product development plans to improve how a customer's needs are met through both products and services.

Four types of data, described below, can help companies prioritize and make good decisions based on such "triggers" within their data driven customer engagement solutions.

Customer Context

Customers interact with companies using a variety of channels over time. Each individual interaction may be characterized as a touch point, and the combination of all of touch points over time can represent the customer journey. Understanding a particular interaction from within the perspective of the customer journey represents context. Properly tracking and basing decisions on this context can shape the nature of the relationship a customer ultimately has with the company, its brands, products and services.

Contextual information can come from historical records of touch points or previous interactions with the company. Any new interactions should also be put into context. For example, an organization's website and its mobile apps should be able to track a customer's current journey through the site or app. This may mean logging the pages that a customer has accessed and the path traversed just prior to a real-time interaction. It could also include elements such as search terms used, whether on an ecommerce site or a support site. It should also include triggers, such as clicked on help or technical support buttons either from within an app or a website.

Research shows that loyal customers really care about "cumulative experiences across multiple touch points and in multiple channels over time[4]." Even if the individual experiences or touch points receive good to high satisfaction ratings, it is the notion of the entire customer journey that really matters. Hence, knowing a lot about the customer journey and the context within which the customer is acting is critical to exceeding the customer's expectations.

Developing Customer Attributes

Within seconds of launching a web browser and pointing it to a particular site or immediately upon starting a mobile app, organizations know a lot about you. Data aggregation services now exist such that within seconds of launching a web browser, they know who you are, your age, your income level, where you live, how many children you have, your spending habits (i.e. do you shop for bargains or do you pay full price), and even your location (IP addresses are often a location give away or location services on a mobile device may show this).

At least four distinct attribute types prove particularly useful when considering how to profitably match communications channels with resources and expert availability when engaging with customers.

[3] A customer journey map is a diagram or flow showing how a customer engages with your company.
[4] "The Truth About Customer Experience", Rawson, Alex, Ewan Duncan, and Conor Jones, Harvard Business Review, September 2013 issue.

- Profiles: This may include the person's name, geolocation, native language, income level, and a preferred communication channel. Profile information can be sourced from CRM data, social network scanning, location services, credit bureaus, etc.
- Demographics: These may be data elements such as gender, age, marital status, whether there are children or not, if the person is a homeowner or a renter, education level, etc. These data can be obtained from CRM systems as well as from credit bureaus, public records, and data aggregation service providers.
- Psychographics: These data include items such as interests, hobbies, activities, personality, and attitudes toward various issues and topics relevant to the company's business interests. These data are often obtained from product warranty surveys, online surveys, or social sites.
- Business Relationship: This is information about the relationship between the customer the organization and may include previous purchases, total spend, membership duration, and previous customer service events.

Figure 2. Customer attributes may include a profile, demographics, psychographics, business value, and other indicators relevant to a particular business situation.

Customer Value

A particular customer's value to the organization may be represented in a number of different ways. A well-known method is to use a calculated quantity known as customer lifetime value (CLV), which is a statistical measure of the profit a business will make from any particular customer based on that customer's influence, loyalty, revenue, and other factors[5]. Other methods are available. One of these is a multivariable model, which factors in quantitate and qualitative data such as

- **Influence**: a measure of an individual's social influence, derived from social sites or social aggregators.
- **Loyalty**: a measure of satisfaction obtained from CRM data, surveys, and net promoter scores
- **Revenue**: an indicator of how much revenue has been generated with pointers to possible future revenue

[5] Customer lifetime value recognizes that a customer represents a relationship over time that is far more valuable than single transaction. It helps organizations know how much to spend in order to retain customers and how much to invest when acquiring them. Numerous articles on CLV and methods on how to compute it are available on the Internet.

- **Costs**: a measure of how much it costs to serve a particular customer.
- **Adoption**: an indicator of how likely a customer is to adopt new products or services

These indicators, and others relevant to a particular organization, may be used along with analytics and data mining to provide guidance as to how important each one is to an organizations' view of a particular customer's value.

Customer Intent

Customer intent is a critical factor for determining how to engage a customer after they initiate a contact trigger, and it can be understood much more accurately by building upon data from the three preceding categories: context, attributes, and value. Predicting intent without contextual information is nearly impossible because the background information is fundamental to interpreting present intent. However, predicting intent can be quite straightforward if comprehensive systems and analytics are in place.

Beyond the suggestions of the contextual data, intent can be interpreted based on the web visits or app usage that immediately led to the initiated contact. This can be correlated with recent purchases, inquiries, outbound marketing initiatives, and other historical touch points. Customers react with loyalty when they experience such personalized service.

When profiles and customer value are not available, it may not be possible to determine customer intent accurately just by knowing the path a customer traversed on a website or where they were in a mobile app when they sought customer to engage. In these cases, a survey or short response form can be offered to customers so that they can state their intent. This is necessary if the other more sophisticated methods referenced above are not conclusive in determining customer intent, but in many cases, the context and the click-through trail that preceded an engagement trigger may be sufficient to estimate intent.

Engagement Options

If an organization has knowledge of the customer's context, attributes, business value, and intent, then a model can be derived that weighs all of these factors and applies business logic to determine how to most profitably and most completely satisfy the customer's needs. Beyond the data crunching, data driven engagement integrates a whole new range of communications options that can be tailored to provide just the right level of support for customers based on their value and individual preferences. For example, customers now have the ability to launch a Web-based voice or video call to an agent right from within an app or webpage. Agents and experts are additionally able to interact with the customer using annotation tools to illustrate where to click in order to access functionality, or they can co-browse with the customer to the location of the information they need. These easy-to-use tools facilitate frictionless and effective real-time collaboration within apps. Some customers report that virtual interactions rival and sometimes surpass in-person service. The potential of smarter data systems is magnified in market-transforming ways when it is coupled with the modern palate of "webified" communication options

An Architecture for Data Driven Customer Engagement

We introduce in this section a model of how data driven customer engagement can operate. In the discussion that follows, we will focus on customer engagement initiated through a browser or mobile app;

however, many of these principles of data driven customer engagement can be adapted to asynchronous interactions including email, SMS, fax, social network traffic monitoring, and regular phone calls[6].

It is important to understand that from the moment a prospect or customer points a browser at the company's website or launches the company's mobile app, data driven customer engagement starts. As illustrated in figure 3 below, customer attributes and value can be developed the instant a person opens a browser page or launches the mobile app. If identity is known via authentication or can be determined using cookies, web beacons, or third party data aggregation services, then these attributes and values can be very precise. If identity is unknown, then the attributes will be unknown and the customer value may be assigned an arbitrarily low number. However, the principles for determining the engagement methods based on the available data still apply.

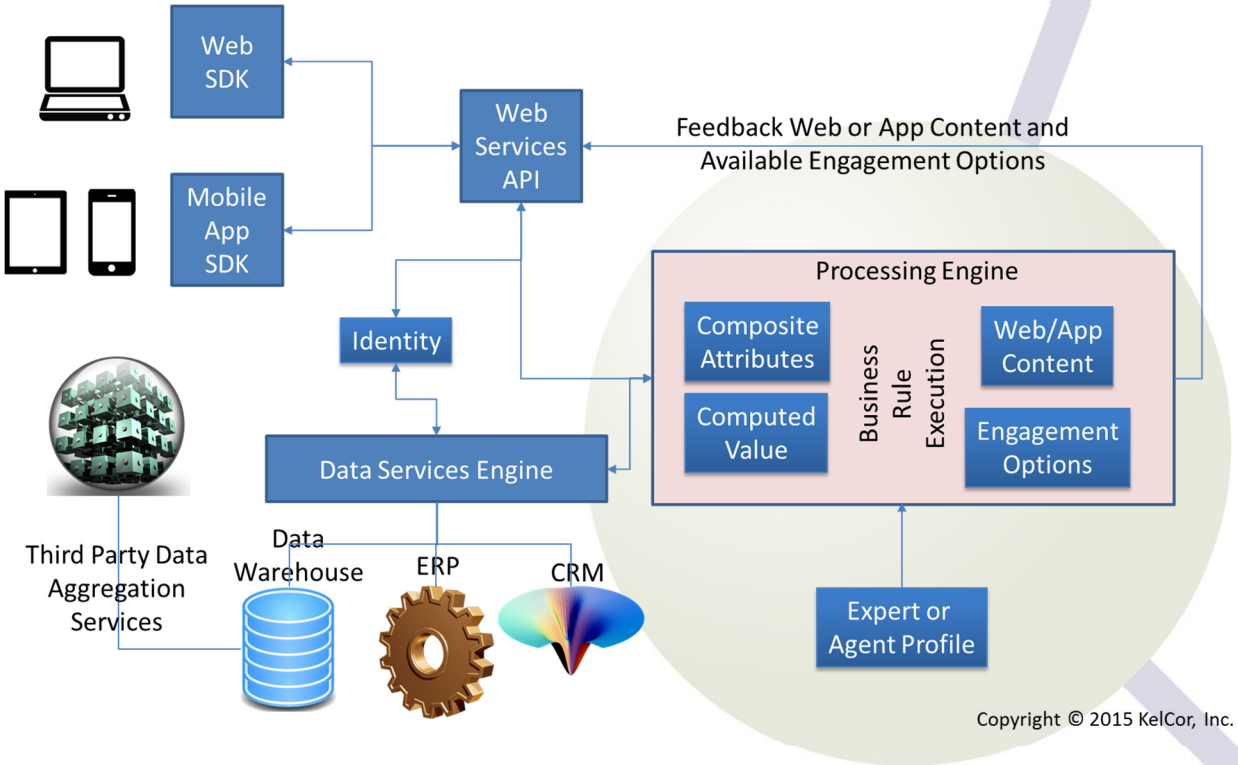

Figure 3. Data driven customer engagement begins the moment a customer or prospect visits the company website or launches the company app. Intent may be unknown, but web or app content to display is data driven as are the available engagement options, all based on customer attributes and value.

If the attributes and values can be collected and interpreted in the Processing Engine, then they can be used, based on business rules, to provide dynamic content to the user along with specific engagement options. For example, a high value customer in a banking application may have a widget placed on the interface showing presence information for relationship managers with whom the person has previously done business. In addition, the widget could allow immediate audio and/or video interaction with these people. Such a widget would not appear on a lower value customer's interface.

[6] For example, if an email or fax arrives, based on who the customer is, customer attributes, computed value, and psychographic data as well as past interactions can be used to determine who in the organization should be invited to fulfill the customer's needs.

Figure 4 illustrates how data driven interactive engagement occurs. The boxes in orange are new elements.

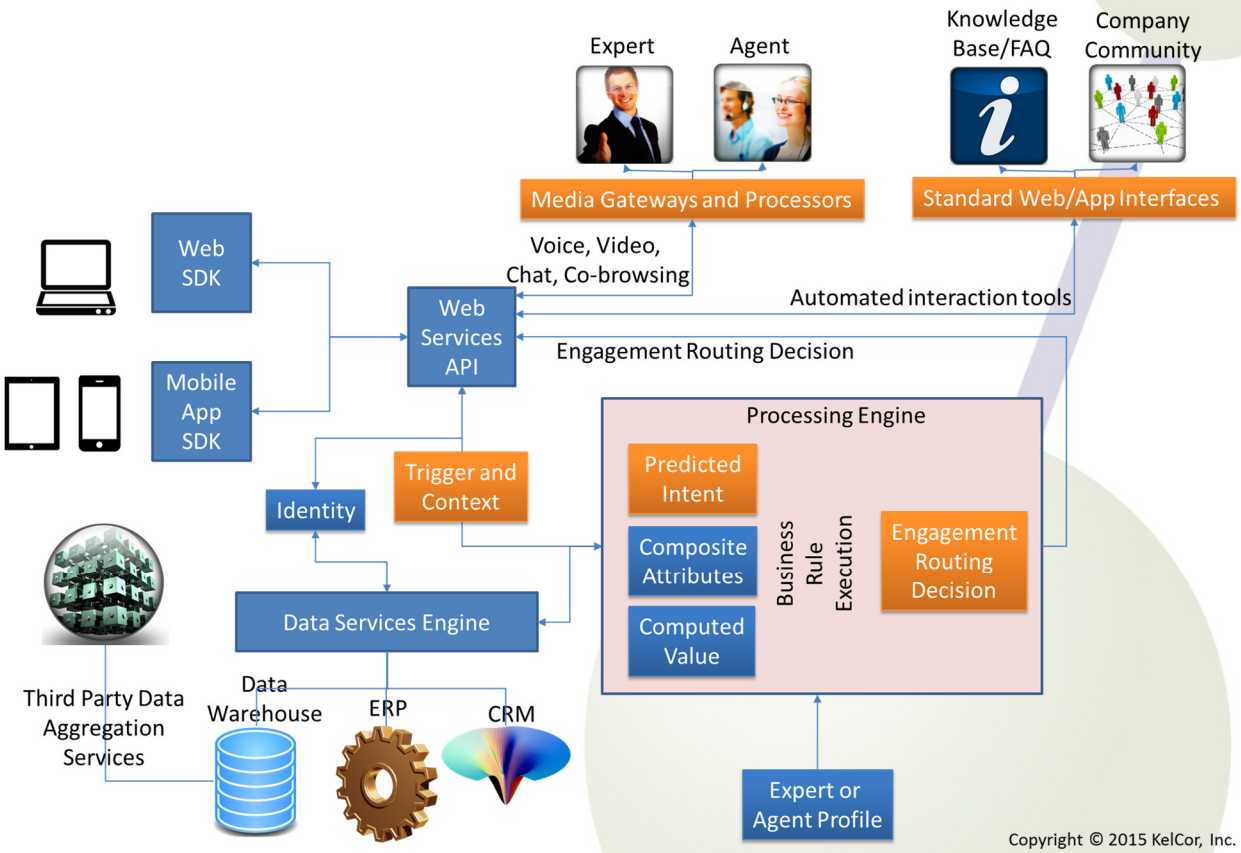

Figure 4. Interactive engagement may begin when a "trigger" occurs. This will typically be a user clicking on some type of help, sales, or support button. The trigger and content are sent to the processing engine, where intent is predicted. That prediction, when coupled with attributes and customer value, lead to an automated engagement routing decision.

When a user clicks on a help button, a "speak with sales" widget, or some other type of interface element that signals a higher level of interaction should occur, a trigger event is generated. Triggers are sent to the processing engine along with the context of what the user was doing at the time the trigger occurred. Context may be items such as a history of the current web or app page a person was on, recent search terms used, CRM data that indicates a person recently received a flyer, and other relevant elements of the customer journey.

Based on the trigger and the context, the customer's intent can often be predicted. In the event that intent is not clear, a simple form can pop up asking the customer for additional information.

Once intent is known or predicted, then based on customer value and attributes, the customer can be routed to the appropriate live agent or resource for assistance. For example, if the customer were a person with a high customer value, and if the person were interested in skiing, then that person could be routed to an expert who has similar interests who could interact with the customer via audio, video, chat, and/or co-browsing. Other customers could be routed to a standard contact center agent, where the same modalities for interacting could be used, the difference being in this case, the person in the contact center may not be a true expert, but simply a standard contact center agent. In either case, the psychographic

customer data could be matched with psychographic data from the expert or agent to provide an optimal interaction possibility.

Lower value customer would be routed to a knowledge base with responses possibly generated by an expert system[7]. Alternatively, they could be routed to the company's social community to seek answers from within the community. Another option for interacting using automated tools, even with high value customers, would be if the customer prefers this type of interaction or if the customer's intent can be immediately satisfied by such an interaction.

Implementing Data Driven Customer Engagement

Many companies would like to close the loop and tie together the data they collect while at the same time removing the siloes that surround their multichannel customer service mechanisms so as to provide much higher levels of customer engagement. However, finding the right tools and partners can be challenging, and a complete solution may ultimately involve multiple partners and toolsets.

We have had briefings with a number of contact center manufacturers and with big data and analytics solution providers to see if there were companies or groups of companies that are able to provide data driven customer engagement to the level we have described in this document. We have spoken with companies that have powerful database technology and offer grid computing to their clients to speed up data retrieval times. In the last few months, we have learned about a collaborative effort between two leading companies, CaféX and Humanify, that we consider real thought leaders in this domain. We think that the combination of their expertise will likely prove successful for businesses pursuing this heightened engagement capability.

CaféX and Humanify recently announced a partnership in which the real-time, Web- and app-enabled communications and customer journey capabilities of CaféX are to be combined with the data analytics and customer support capabilities of Humanify. CaféX received the Enterprise Connect 2014 Best of Show award for its innovative customer engagement solutions while Humanify was recently spun out as a subsidiary of TeleTech, a company well known for its customer experience solutions.

In the combined solution, CaféX provides back-end infrastructure and APIs that allows organizations to embed real-time communications capabilities into mobile apps and web pages. End users can communicate with contact center agents or experts in the company, based on how the business rules are set up, using audio, video, and chat; once connected, agents can in turn initiate co-browsing and annotation on the end user's screen using CaféX's software. These capabilities are based on a new technology, called WebRTC, that requires no browser downloads. On the back end, CaféX's infrastructure integrates with existing contact centers from Cisco, Avaya, and Aspect as well as with several unified communications systems so that companies can continue to use their existing telephony, IM/presence, and video investments.

Another feature that CaféX brings to the solution is the ability to track the customer journey and provide contextual information to an agent or expert. The customer journey includes elements such as which pages the customer has visited on the website or which page in the mobile app the customer is on currently. Customizations are possible so that additional contextual information, as needed for a specific

[7] In artificial intelligence, an expert system is a computer system that emulates the decision-making ability of a human expert. Expert systems are designed to solve complex problems by reasoning about knowledge, represented primarily as if–then rules rather than through conventional procedural code. (Source: Wikipedia.org).

application, can be obtained. Context is critical because it can help a contact center agent understand the customer's intent. Alternatively, context information can be fed into an expert matching system that can help route customers to the agent or expert best able to help them.

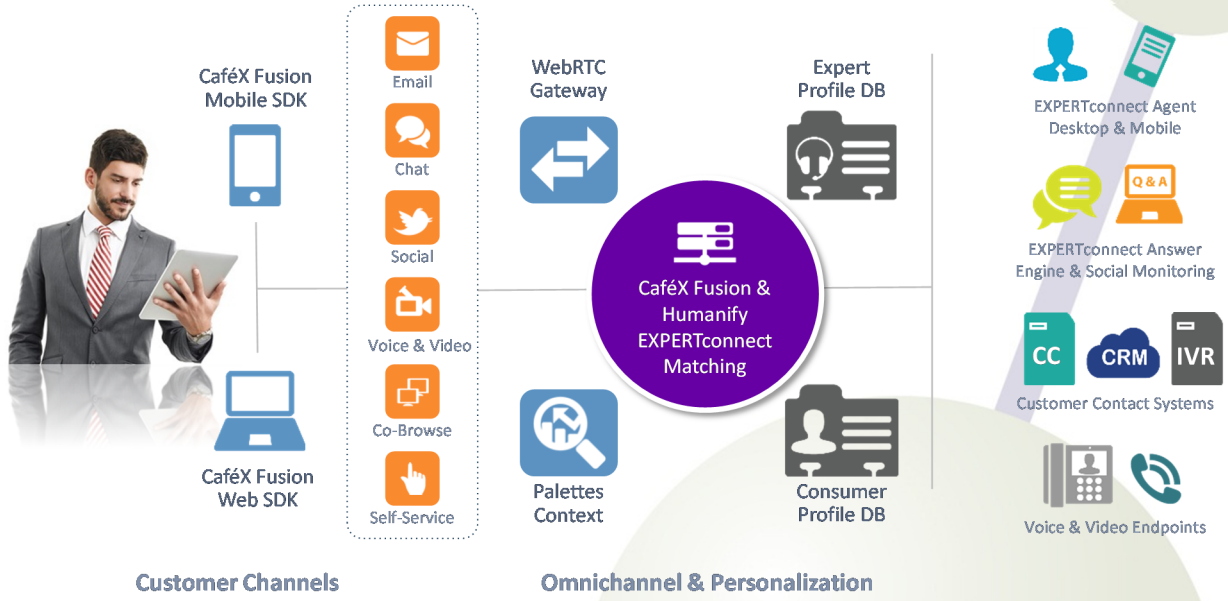

Figure 5. The combined CaféX and Humanify offering is a solution that enables data driven, real-time customer engagement. Based on an organization's business rules, and using customer context, intent, attributes, and values, customers are routed to the best resource, which can be a specialist, a regular contact center agent, or a knowledge base, which most profitably meets their needs.

Humanify's contribution to the joint solution includes data collection and analysis tools as well as a matching engine that uses customer attributes, value, and intent to match a customer with the agent or expert that will best meet their needs. Based on business rules, the system can also route customers to knowledge bases, FAQs, or an organization's social community to satisfy customer intent. This flexible engine can use the algorithms developed by Humanify to compute these informational elements, such as customer value, or it can receive input from data and analytics systems an organization may already have in place. For example, CLV can be computed by a company's existing systems and fed into Humanify's matching engine. Humanify's software can also interface with data aggregation services and social networking feeds to generate customer profiles, including psychographic information as part of a customer's attributes.

In the combined solution, real-time communications – chat, IP voice, video, and co-browsing – go through the CaféX WebRTC gateway and from there to the agent endpoints. CaféX also integrates with UC solutions so that any employee in the company that has chat, telephony, or video capabilities can also participate in an interaction session. Thus, experts who do not reside in a contact center can be made available to customers or clients.

CaféX APIs collect user contextual information through a mechanism called CaféX Fusion® Palettes; Palettes sends the contextual data to the Humanify Expertconnect Matching analytics engine where it is incorporated with other customer data, including the customer attributes and value. Ultimately, the Expertconnect Matching engine determines which channels for real-time engagement should be available to a customer, based on customer attributes, value, and intent. Then as the customer seeks interaction,

Humanify's Expertconnect Matching engine matches customers with the best agent or expert based on both the customer's profile information and an agent's or expert's profile and their availability.

While the system sounds complex – and under the covers there is complexity – Humanify and CaféX are building the integrated solution so that it is relatively straightforward to implement. The hardest part of developing a data driven engagement solution will be determining which customer attributes are most important, how to best quantify customer value, and developing psychographic data on the agents and experts within the company so that the matching engine routes most profitably. CaféX and Humanify work closely with their clients to tailor solutions to real business scenarios, building on their experience with existing customers. Their combined offering also includes tools for the customer to take more control of the priority given to each data flow within the decision engine.

	CaféX	Humanify	CaféX + Humanify
Voice/IVR/Self-Service		⊙	⊙
Email		⊙	⊙
SMS		⊙	⊙
Live Chat	⊙	⊙	⊙
Social		⊙	⊙
OTT Voice (WebRTC)	⊙		⊙
Video (WebRTC)	⊙		⊙
Co-browse	⊙		⊙
Matching Engine		⊙	⊙
Cross-Channel Escalation	⊙		⊙
Mobile Expert Application		⊙	⊙

Figure 6. Engagement capabilities for CaféX and Humanify shown separately and together with the combined solution offering shown in the column to the right. CaféX provides the Web-enabled real-time communications capabilities while Humanify supplies the data analytics engine for matching customers with human experts or agents, or alternatively, with automated self-service tools.

A Final Illustrative Use Case

Now that we have described new-fashioned mediated customer engagement and the specific partner-approach from CaféX and Humanify, we append a brief case study that illustrates some of the strengths of this offering.

> Mary runs her own publishing business with five employees in Dallas, Texas, USA. She bought a top-of-the-line multifunction printer with the premier support package from SmartOffice, a nationwide office supply chain. She has a long purchase history with SmartOffice. When her machine malfunctions, she goes online to look for a solution from the manufacturer but browses to SmartOffice when she is unsuccessful. Her business is held up by the broken printer so she is anxious for an answer. The website recognizes Mary, and provides her with several ways to engage, including a chat button and a special video button because Mary is a preferred customer. Mary chooses the video button, and the system sends a "service call" out through the Expertconnect engine where it matches Mary's context, personality attributes, location, and other qualifiers with an agent who is compatible.
>
> The system favors her proximity especially, since SmartOffice knows that customers will often need to go to a nearby store for a final solution. Manuel is the lead printer technician at the SmartOffice just

a mile from Mary, where she often shops. Manuel is also highly rated for delivering consumer solutions. He is equipped with a tablet that runs an agent portal application where he has indicated he is “present” for external calls. If Manuel doesn’t answer within thirty seconds, the call will route to two other agents with high compatibility scores, but he is available and answers Mary’s call. Based on purchase history, Manuel sees Mary recently purchased a printer. They begin the conversation with Manuel knowing Mary was looking for support, so he suspects Mary’s intent is support for the new printer. After a short greeting, confirming Mary’s intent, the mobile app on Mary’s phone is able to pull in an error report from Mary’s printer.

Manuel immediately knows what the problem is and asks Mary to open Panel 1, pull out the drawer, and describe the small blue pin inserted in the side of the roller. He sends her a picture of what it “should” look like, circling the pin on his tablet so that Mary, on her Web-based interface, can see exactly what he means. “What pin?”, Mary asks. “That’s kind of what I figured,” replies Manuel, “we have seen a few of these pins crack after hard use and fall out.” He tells her she is under full warranty and that he can either show her how to fix it or schedule a tech, but they are not able to work her in for a couple of days. Mary opts to send her assistant to grab the part at SmartOffice where Manuel has it waiting at the counter. Mary reconnects with Manuel fifteen minutes later in the same Web-based portal. He uses the application again to describe to her the quick process of replacing the part and she is back up and running thirty minutes after her initial call.

Mary and SmartOffice have had a positive experience solving a problem, enabled by data driven mediated customer engagement and communications tools that provided exactly the solution she needed in a very timely manner.

Actionable Recommendations

Opportunities abound for better engaging customers by taking advantage data driven customer engagement solutions combining data analytics, communications-enabled apps, and contact centers.

Actions for organizations to consider:

- Obtain executive, strategic sponsorship for data driven engagement initiatives, as such projects tend to cut across a number of internal organizations.
- Favor architectures that reuse existing IT assets, support a broad range of customer interaction channels, especially mobile, and take an integrated approach to managing interactions across channels and throughout the customer journey.
- Pilot new data driven engagement technologies, including video, co-browse, mobile self-service, and personalized resource matching, with close monitoring to evaluate user adoption, potential business impact and technology requirements.
- Don’t shy away from a limited production deployment. Test new technologies on a small subset of customers initially, typically high-touch users of mobile apps, and focus on novelty channels first (e.g. in-app video or advanced self-service) before adding other capabilities.
- Humanify and CaféX are the first partners we are aware of who have developed an architecture that encompasses data driven customer engagement as we have defined it. You should seek to understand how this solution works and whether the new engagement scenarios they enable will help your organization better serve customers in the new ways they will expect and value.

Disclosure on Editorial Control

KelCor has been compensated by CaféX and Humanify to write this case study. However, KelCor has maintained full editorial control throughout.

About the Authors

Brent Kelly is Principal Analyst at KelCor, Inc. where he focuses on the intersection of business technologies comprising unified communications, social networking, video, cloud services and mobility. Dr. Kelly provides strategy and counsel to key client types including Chief Information Officers, Chief Technology Officers, investment analysts, VCs, technology policy executives, sell side firms and technology buyers. Dr. Kelly has been an independent consultant and analyst since 2001, writing hundreds of articles and presenting at numerous public and private events. He has served as the Vice President of Marketing for Sorenson, an early innovator in the IP communications space, and as the CEO of a privately held manufacturing company. Prior to this, Dr. Kelly was part of the team at Schlumberger that built the devices Intel used to test Pentium microprocessors. He also led teams developing real-time data acquisition and control systems, and adaptive intelligent design systems in several Schlumberger Oil Field services companies including four years of R&D experience in Europe. He has a Ph.D. in engineering from Texas A&M University and a B.S. in engineering from Brigham Young University. Dr. Kelly is serving in his second term as an elected official in his community.

Matt Krebs is a research analyst at KelCor focused on human/technology interaction. His primary interest is in technological innovation, both hardware and software, and the emergent technosocial systems and possibilities that attend innovation. His recent research addresses changing notions of ownership, value, and expertise in the context of information and communication technologies. Mr. Krebs is a Ph.D. candidate in the department of anthropology at the University of Kentucky where he is specializing in ethnographic and social network analytical research methods. He was previously the director of the Japan/America Society of Kentucky (JASK) where he worked with Toyota, Hitachi, and other auto-industry OEMS and suppliers. At JASK, Mr. Krebs redesigned business processes and customer relations to incorporate new web-presence and communication software. He has also worked for a regional development agency in Kentucky (BGADD) where he developed its international trade consulting business and arranged a region-wide study of business clusters. Mr. Krebs has an M.A. in international commerce and diplomacy (University of Kentucky) and a B.A. in international studies (Brigham Young University).

About KelCor

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