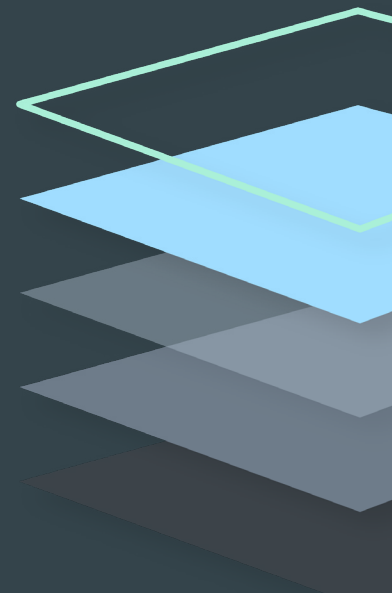


# The Ultimate Tech Stack for Deep Customer Collaboration

*Capitalizing on untapped opportunities to prescribe, deliver, and measure value with customers.*

An eBook by MetaCX + Valuize



## “Software is eating the world”

This famous statement made by Marc Andressen in 2011 set the tone for the proliferation of software that has since engulfed almost every aspect of business across all industries and ecosystems.

The software avalanche has provided opportunities for companies to reimagine the way they go to market and serve and support their employees and customers. The best companies have embraced the opportunity to use technology to improve the employee and customer experience.

Customer management has been a tremendous beneficiary of technology innovation over the last 20+ years. The tech stack companies build to support their customer base plays an increasingly critical role in determining how teams effectively manage and serve customers day-to-day. There are countless ways in which innovation can catapult an organization to the future and create competitive advantage.

But where should companies start? In the pages below, we will outline how a tech stack that is specifically designed for deep customer collaboration can elevate the customer experience and ultimately make customers more successful enroute to higher retention and growth rates.

We will define the concept of deep customer collaboration, explain how it relates to the other layers of the customer management tech stack, and share the benefits of adopting such an approach. We'll also outline the use cases that should be considered to facilitate deep customer collaboration and deliver more value to customers.

# What is Deep Customer Collaboration?

Deep customer collaboration builds on the deep collaboration concept that productivity and collaboration applications are on a collision course—an output of the evolution of the way people work. Originally explained by Jake Saper, Partner at Emergence Capital, deep collaboration recognizes that a person doing a specific task shouldn't have to leave a single piece of software to get that job done. All the productivity and collaboration (internal and external) features needed to accomplish a task should live in the same place.

**“Deep Collaboration...the term refers to software that combines productivity and collaboration functionality in one place to get a specific job done.”**

*Jake Saper*

Partner, Emergence Capital

Deep customer collaboration is the confluence of information, data, and assets that are used to productively manage a customer relationship alongside the strategies, activities, and conversations that create effective alignment between a company and its customers.

The idea of deep customer collaboration highlights that it is increasingly necessary for organizations to consider how they are navigating the crossroads of productivity and collaboration in order to effectively manage customers across the lifecycle. More specifically, it dictates that customer management should have the ultimate goal of value creation and delivery. If a company is going to bring deep customer collaboration to life, it has to build systems and use technology that ensures customer management teams are put in the best position to align with customers to deliver real business impact.

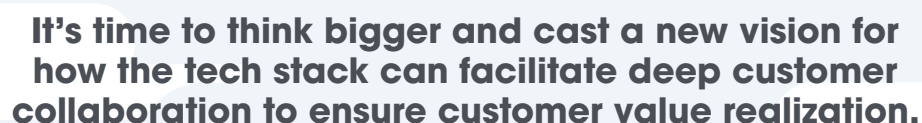


Across the spectrum of customer management responsibilities, there are various strategies for customer engagement and collaboration. On one side, tech-touch models have been deployed to empower suppliers to manage the customer journey with minimal direct conversation. On the other side, high-touch models exist where the customer/supplier relationship is very strategic and hands-on—where strong collaboration is paramount to developing successful, long-term relationships.

As sales and customer success strategies become more centered around the creation and delivery of value, the customer management tech stack must be enhanced to support this evolution across all customer segments. Deep customer collaboration is at the core of this enhancement.

## Deep Customer Collaboration and the Layers of the Tech Stack

In business today, there are numerous untapped opportunities for technology to create stronger bonds between companies and their customers. For all of the technological innovation that has been applied to the customer lifecycle in recent years, cracks remain that prevent sales and post-sales teams from realizing the true potential of customer collaboration and success. Boundaries need to be pushed even further to better position organizations to work collaboratively in the context of customer needs and objectives.



**It's time to think bigger and cast a new vision for how the tech stack can facilitate deep customer collaboration to ensure customer value realization.**

The big question of course is, where does customer collaboration fit into the customer management tech stack? While collaboration applications have existed for years, customer management technology has not been purpose-built for deep customer collaboration.

The first step in building a tech stack for deep customer collaboration is to understand what the customer management technical landscape looks like today. Typically, there are three layers to an organization's customer management tech stack—a system of customer record, system of customer insight, and system of customer action. The layers work together to enable data-driven action to be taken by the company on their customers. Note the deliberate use of the word 'on'. On their customers. Not with their customers. We will return to this critical point later.

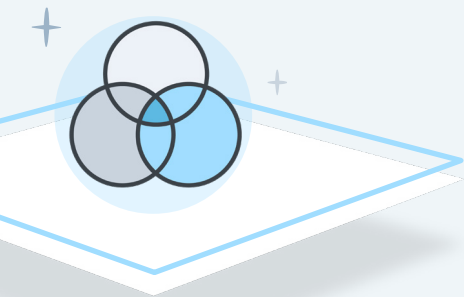
Let's further break down the three layers of the customer management tech stack seen in organizations today.

# The Layers of the Customer Management Tech Stack



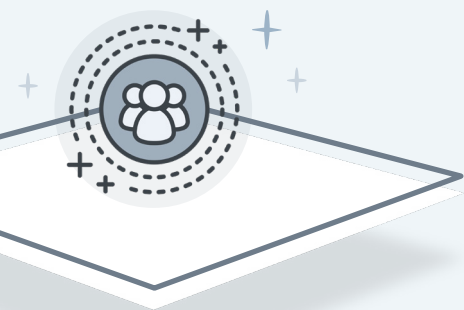
## The System(s) of Customer Record

The system(s) of customer record is where, in theory, the golden record of a customer sits in an organization. It's where you go to access the core information about a customer: contact, opportunity, contract and activity data. In reality, there is nothing golden about the customer record in most organizations. It's more of a murky brown record plagued with data inconsistencies and cleanliness issues. But that is a whole other topic to tackle in another ebook!



## The System of Customer Insight

Building upon the system(s) of record is the system of customer insight—technology designed to enable questions to be asked of the customer data stored in the system(s) of record. The system of insight performs an analysis of customer data to enable answers to any number of questions—the insights. These insights are typically presented via dashboards and reports visible only to the vendor/supplier. More advanced organizations are enhancing their system of customer insight to monitor customer actions in order to deliver insights on progress and success. These insights may be related to product usage, user activity, feature utilization, and more.



## The System of Customer Action

The system of customer action facilitates customer-facing teams to take action on customer insights. These actions may be executed manually or automated by the system itself. Ideally, the action has been triggered by one or more customer insight.

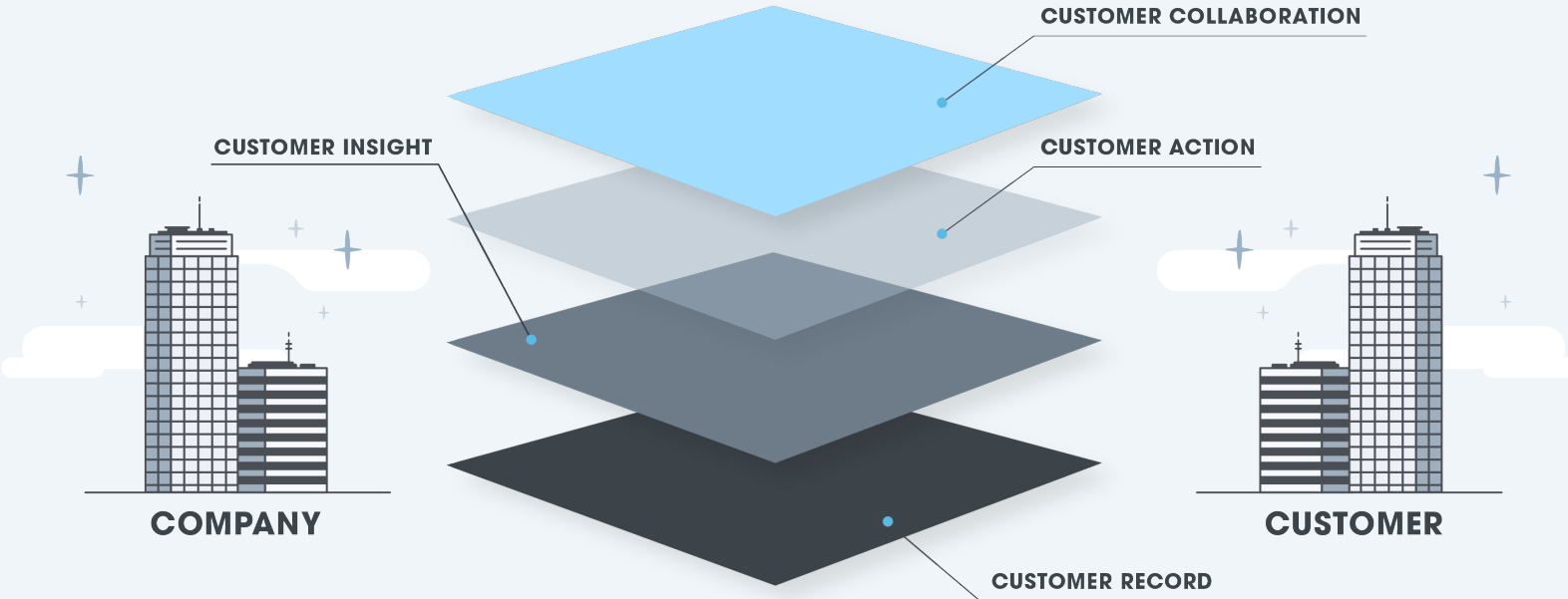
There we have the three layers of the customer management tech stack seen in most organizations today. When properly integrated, these layers enable data-driven action to be taken on the right customer at the right time. It's a powerful trio, but can be so much more impactful by transitioning from taking action on the customer to taking action with the customer.

# Introducing the Customer Collaboration Layer

Adding the customer collaboration layer to the customer management tech stack is the new frontier for facilitating deep customer collaboration. The layer encompasses all digital customer touchpoints that stem from the various technologies and applications that connect the company to the customer.


Defining the customer collaboration layer as a standalone technology layer is an important first step in establishing its importance and potential impact on the customer experience.

From there, there is real opportunity in creating a cohesive customer experience within the customer collaboration layer. The strategy should be to deliver the best possible unified experience to customers and ensure they are put in the best possible position to receive value from the partnership.




**“The customer collaboration layer must be constructed with a strategy that seeks to deliver the best possible unified experience to customers.”**


The various responsibilities, use cases, and processes most common to the customer management function should all be housed within the customer collaboration layer.



**Project Management**




**Data Sharing**



**Asset Management**




**Training & Education**



**Shared Success Planning**



**Communication & Feedback**



**Customer Content**



**Community**



**Support & Services**



**Business Reviews**

# Capitalizing on Integration Enroute to Consolidation

Over time, the productivity aspects of the customer record, customer insights, and customer actions layers should converge with the customer collaboration layer. As defined previously, deep collaboration occurs at the crossroads of productivity and collaboration functionality. This starts with integration and ultimately ends with the next generation of purpose-built customer collaboration software.

To realize the potential of deep customer collaboration today, it's important to acknowledge the relationship between the layers of the tech stack and the role of integration. Integration is two-fold: first, direct integrations between technology solutions strengthen workflows and open

up productivity opportunities. Second, insights can be extracted across the layers to inform business decision making, create value for customers, drive engagement and adoption, and develop tighter feedback loops. Each use case presents an opportunity to dissect the experience an organization is delivering to its customers and enable remediation.

Ideally, the customer collaboration layer unifies the customer experience. Leaders should be looking for opportunities to centralize where an employee and a customer go to work together, track progress, and ultimately ensure value is being delivered.

## Opportunities Created by a Customer Collaboration Layer

The customer collaboration layer presents a tremendous opportunity for innovation. Here are four ways you can use the customer collaboration layer to put your team in a better position to serve customers.



### 1. Collaboration in Context

Working in the context of the needs of your customers is the ideal state of customer management. It's more important than ever to create an outcome-based plan with customers to ensure they have a path to value achievement. The customer collaboration layer should include an outcome-based shared success plan to create the correct context for the work that needs to occur to create a successful customer relationship.



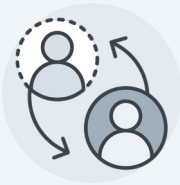
### 2. Bidirectional Data Sharing

Technology creates new opportunities for data sharing. Bidirectional data sharing means that data can be shared between two or more entities directly to a neutral third party in order to track value creation. This emerging use case will gain more attention as technology opens up safe and secure means of data sharing in the customer collaboration layer.



### 3. Creating One Place

Customer portals have been around for ages, but the portal experience has not been purpose-built with collaboration as the backbone, the goals of the customer as the focal point, and mutual action plans as the productivity engine. By housing all customer management use cases and processes in one place through consolidation and integrations, you can ensure continuous alignment and success.



### 4. Building for the Lifecycle

The customer collaboration layer should be built with the full lifecycle in mind. Leaders should consider all touchpoints across the customer experience and build a tech stack that enables a single, cohesive experience. From sales to services to customer success, one of the biggest opportunities is to think holistically about how the customer collaboration layer can unify the customer lifecycle cross-functionally.

## The Future is Bright for Deep Customer Collaboration

The strategy behind deep customer collaboration combined with the addition of a new layer to the customer management tech stack casts a vision for a better, more unified and productive customer experience. A well constructed customer collaboration layer creates one, co-owned space where both suppliers and their customers can go to unlock the full potential of the partnership. Companies must invest in new ways to bring their teams closer to customers with a greater focus on value.

Within the world of customer management, opportunities exist to reimagine how the tech stack can better support customer collaboration with value creation as the ultimate goal. Those that embrace the importance of deep customer collaboration understand the growing role that technology plays in ensuring longer, more healthy customer relationships.



## The Ultimate Tech Stack for Deep Customer Collaboration

*Capitalizing on untapped opportunities to prescribe, deliver, and measure value with customers.*

An eBook by MetaCX + Valuize

