

Developing Marketing Capabilities by Mapping Customer Journey and Employer Journey, Considering the Blurring of Boundaries between Marketing, Technology and Management

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Abstract

Within the new business model, there is a reevaluation of the customer journey from end to end, making decisions on the basis of business analytics, consolidating the customer culture considering the long-term customer value delivery, measuring customer culture, integrating customer thinking across the business performance and customer perception. There are challenging lessons to learn with regard to putting the customer first or putting the employee first and put the customer second, delivering the brand promise consistently, knowing what is necessary to change in how the organization operates and relates to its customers, considering both the customer journey and the employer journey. As customers preferences for channels and technology are evolving, CMOs must keep the pace with the quickly evolution of the technology landscape, considering the democratization of marketing, marketing co-creation with customers, the Grand View of MarTech, and the modern marketing stack, implementing a MarTech strategy accordingly. There is no doubt about the need of using customer intelligence tools to create a better customer experience (CX), including with the help of the artificial intelligence (AI), and to drive customer-centric culture. And as CX and the customer success (CS) are considered being intrinsically connected and impacting each other, it is useful to consider, at the level of B2B companies (while also seeing the blurring line between B2C and B2B selling), the transition from the CS 1.0 to the CS 2.0, with impact on CX and on the implementation of a new type of officer in the company's organizational structure, the Chief Customer Success Officer.

Keywords: Customer and Employer Journey; MarTech Strategy; Customer Intelligence;

Customer-First Marketing; Customer-Centric Marketing; Customer Success 2.0; CX

JEL Classification: L84; L86; M31; M37; O33

A new business model, a new customer, and the contribution of AI in storytelling

In the previous issue of our journal (HMM, Volume 7, Issue 4) we made reference to a Forrester consulting thought leadership paper commissioned by Genesys, released in November 2017 – entitled “Artificial Intelligence with the human touch. Blend AI with human agents to improve both customer and agent satisfaction” – and which revealed that: blending AI (AI solutions being adopted in order to improve both customer and agent satisfaction ahead of cost savings; these solutions better handling simple requests with greater efficiency) with human agents (who are still superior in understanding emotion and building trust, even excelling at conveying emotion and understanding context) allows enterprises to achieve the strengths of both (using each to its full benefit); there is already significant evidence regarding wide benefits, including improved customer experience and increased agent satisfaction and efficiency, one hand, and this transformation of enterprises by AI has extended to customer service, on the other hand.

At the end of the same month, the reputed Software AG CEO Karl-Heinz Streibich underlined the significance of the step to set the standard for IIOT adoption – the foundation, in September 2017, of ADaptive Manufacturing Open Solutions (ADAMOS3) by leading visionary manufacturers from Germany, Singapore and Japan, with the view of jointly addressing the huge opportunities of the IIOT markets – within the context of: the arrival of AI; taking advantage of the digitalization within the Industry 4.0 (Industrial Internet), considering the customer interface, the customer feedback loop, social sentiment monitoring, the integration of external data sources etc. provided by IT; the need that every CEO must become a software expert (as every company – enabled to kick-start its own IIOT adventure by the APP factory provided by ADAMOS – must become a software company). (Streibich, 2017)

Two years ago, in March 2016, McKinsey’s representatives underlined that in order to understand how to meaningfully improve company’s performance it is necessary to look at the customer experience (CX) through customer’s own eyes and along his entire journey (knowing what a customer journey entails: episodes, end-to-end experiences, language, channels, duration, repetition), beyond focusing on individual touchpoints across new channels, devices, applications, and more. There were highlighted six actions as being critical to managing customer-experience journeys (knowing that it is more likely that customers repeat a purchase, spend more, recommend to their friends, and stay with a company, if that company is delivering a distinctive journey experience). (Maechler, Neher and Park, 2016) More recently, in January 2018, McKinsey’s Barr Seitz launched the invitation of rethinking customer journeys with the next-generation operating model, and this as a conclusion of a very challenging talk with two colleagues – McKinsey’s senior partner Alex Singla and partner Elixabete Larrea Tamayo, coauthors of “The next-generation operating model for the digital world” – about the next-generation operating model within the digital way of life in industry after industry, where company leaders are facing the reevaluation of the customer journey from end to end. It was therefore interesting to find out that (as suggested by Elixabete Larrea Tamayo) an effective next-generation operating model presupposes to focus on building value and move away from the silo thinking: by organizing the company’s efforts around these end-to-end customer journeys and around some of the internal back-office processes; by applying technologies and operations capabilities to these end-to-end customer journeys in combination and in the right sequence.

On the other hand, we all know the importance of a marketing story. What is new is the contribution of AI in storytelling (by sharpening stories and amplifying the emotional pull), the potential for machine–human collaboration in video storytelling to improve the storytelling process being investigated by The Massachusetts Institute of Technology (MIT) Media Lab. (Chu, Dunn, Roy, Sands and Stevens) And thanks to a broader collaboration between MIT’s Lab for Social Machines and McKinsey’s Consumer Tech and Media team there were developed machine-learning models which reviewed thousands of videos and constructed emotional arcs for each one. As highlighted by the McKinsey’s representatives, they developed a method for

classifying stories into families of arcs (videos sharing the same emotional trajectory), which combines a clustering technique (“k-medoids”) with the process of dynamic time warping (which detects similarities between two video sequences varying in speed).

Growing data scientists’ contribution to grow company’s analytics capability by connecting them to the world of domain experts. Mapping both customer journey and employer journey, and excelling at customer care

In December 2017, McKinsey’s representatives explained how to withstand disruption and expand their shares of the value in their markets companies need to be enabled by a next-generation operating model which involves at the beginning to modify simultaneously the customer journeys (understanding all its facets), the business operations (making them more efficient and responsive so as to optimize the customer journeys), and the working methods, using accordingly integrated teams comfortable pursuing incremental gains on a continual basis. In other words, companies must race to catch up the digital-native companies that have already captured value by mastering the use of next-generation operating models. (Bollard, Duncan, Rangelov and Rohr, 2017)

There are four types of decision questions addressed by business analytics (according to Gartner, 2015), these questions referring to: what happened (descriptive analytics); why did it happen (diagnostic analytics); what is likely to happen (predictive analytics); what should I do (prescriptive analytics). The reputed Professor Prof. Stijn Viaene approached – in a new article published in the European Business Review in November last year – the new challenges for executives and business leaders trying to remain relevant and appealing for customers moving at the speed of the Internet, by making decisions on the basis of business analytics (considering the competitive necessity of data-driven business decision-making) and offering accordingly a continuation of valuable customer experiences. Viaene showed that advanced business analytics (the business analytics capability developed over time project by project having as basis a robust data logistics platform providing data logistics support and supporting conversation management) allows breaking the trade-off between reach and richness, handling high-volume, high-velocity and high-variety data by investing in cost-effective digital capabilities, thinking in terms of end-to-end data logistics while considering the long-term customer value delivery, the exploration and exploitation logistics, and the need to connect the world of data scientists to the world of domain experts, and combine business and data modelling, data discovery, decision operationalization and cultivation skills etc. seamlessly working together as a team all through a project’s life (all along this project’s life the combination of customer desirability, operational feasibility and business viability being managed by the project teams). (Viaene, 2017)

But considering the long-term customer value delivery presupposes to better understand the importance of the customer culture (changing culture being considered a long term business strategy). According to Chris Brown, Cofounder and CEO, MarketCulture Strategies (interviewed at the beginning of 2018 by Ian Golding), an organisation must believe in creating

value for customers, having its culture aligned to creating customer value being a condition to an effective marketing strategy. That is why it is important to have a tool to measure customer culture such as that developed by MarketCulture Strategies – the Market Responsiveness Index (MRI) – which measures three factors (mindset, behaviour and process), allows the assessment of the difference between customer focus and internal focus, aligning culture with business performance, customer perception and employee engagement, as shown in the figure below:

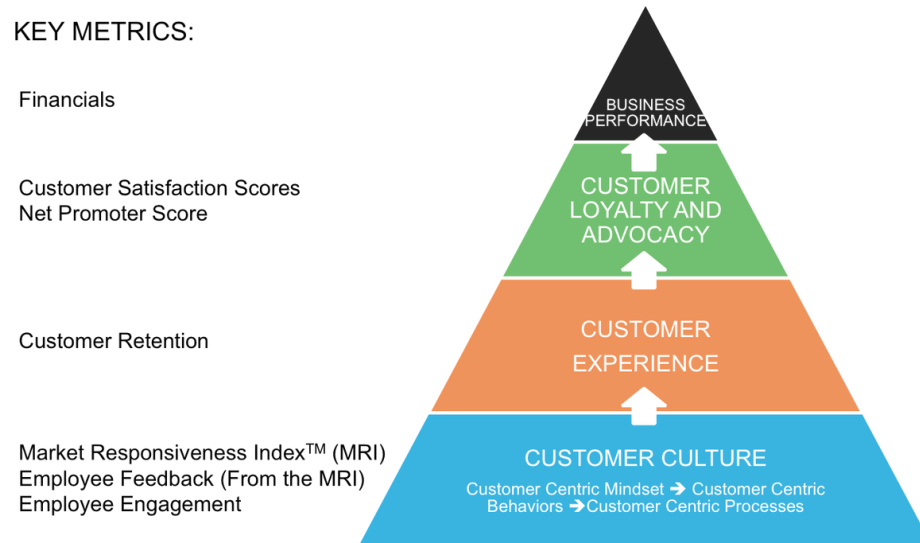


Figure 1: The Market Responsiveness Index (MRI), MarketCulture Strategies

Source: Golding, I., The importance of customer culture – an interview with Chris Brown, February 5th, 2018 (work cited)

Brown argues that MRI allows: integrating customer thinking across the business, business performance and customer perception being both positively affected if the MRI measurement (MRI implementation taking approx. 6 weeks to put in place and min. 12 months to see the effect across the organisation) goes up; benchmarking a company versus the best companies in the world, considering the 8 disciplines of a customer culture (strategic alignment, customer insight, customer foresight, competitor insight, competitor foresight, peripheral vision, empowerment, collaboration) which drive profit.

And as there is a strong relation between having a customer culture and the preoccupation of becoming sustainably customer centric, the above mentioned reputed Ian Golding brought in the same period of time and also in a column on CustomerThink two other arguments within this framework: (Golding, 2018)

- an interesting conversation with James Dodkins, a fellow Customer Experience Professional who will be publishing in 2018 a book entitled “Put Your Customers Second”, in which he documented why company’s employees must be treated in the way company wants them to treat its customers;

- discussing the subject of putting the employee first with Chantel Botha (while working with him), one of the most prominent Customer Experience Professionals in South Africa, this partner introduced him to the concept of the “employer journey”, as shown below:



Figure 2: Employer Journey, Chantel Botha

Source: Golding, I., Golding, I, Understanding the Employer Journey – The Employee Engagement Loop, January 29th, 2018 (work cited)

Golding shows that to implement this above mentioned framework of the “employee engagement loop” in order to build a customer centric culture by delivering the desired employee experience, a company has to follow six steps: to attract the right kind of employees into the business; to infuse the brand DNA as a never ending cycle of activity; to inspire excellence in everything its employees do; to encourage curiosity and learning from its employees; to also actively encourage innovation and co-creation from its employees; to reward (is not necessarily a monetary thing) its employees for the work they do to constantly improve the ability of its brand to meet the needs and expectations of its customers.

Also thanks to Golding we find out a challenging “Customer Experience perspective” – coming from Manuela Pifani, introduced by him as “one of the most passionate, professional, capable CX Professionals” Golding has ever had the pleasure of coming into contact with – underlining among different aspects that CX must delivers the brand promise consistently, over time and strengthen this way the trust in the brand and customer loyalty, by knowing what is necessary to change in how the organisation operates and relates to its customers (well before starting to communicate to the customers the new brand promise, being necessary to strongly focus on designing the promised CX, building the right capabilities, aligning the whole organisation behind the brand promise delivery and empowering all fellow workers in organizations to support it end-to-end). (Golding, 2018)

So, we can see that there are two types of journey mapping, considering both customer journey (in order to understand where companies’ customers are frustrated, and what might lead them to defect) and employer journey (which can lead to the customer friction), the last one

being critically important to customer experience. (Tincher, 2017) But to avoid that the customer journey maps end in failure it is necessary to also apply a solid methodology to a customer journey mapping project (involving a broad cross-functional team), such as Prosci's ADKAR Change Management Model (**A**wareness of the need to change; **D**esire to change; **K**nowledge of what and how to change; **A**bility to change; **R**einforcement of the change), because a company must both to be aware of the need to improve, and to want these change (which is made from the results obtained from the journey mapping project), and after that to create a better customer experience. (Tincher, 2018) And of course not forgetting that: customers want their problems solved quickly, before calling, one of the best ways to get and keep customers being Zero Call Resolution; (Tincher, 2016) cultivating Zero Call Resolution presupposes ensuring a customer experience seen by customer as seamless, and never perceiving an issue or reason for complaint, companies ensuring this way delight with the help of modeling tools and predictive analytics systems such as the Allegiance Spotlight™ data mining system (already six years old); (Mandel, 2015) as shown by MaritzCX (the combination of the Allegiance award-winning CX platform and Maritz Research strategic consulting services) the gaps between the desired customer experience (CX) and the one that the customer actually receives can be seen by a company with the help of customer journey mapping, (MaritzCX) also taking into account the crucial role played by technology in the CX efforts (i.e. feedback from many different sources and touch points, analyze it, and distribute it in order to make the desired changes); (MaritzCX) it is very important to understand the role of the way we behave, because as underlined by the first American manager to be hired by Toyota, John Shook, transformation starts from our behavior, being ready to learn, adapt, and apply new changes, managing change, culture and circumstance being always unique and changing. (O'Reilly, B., Sarvas, 2017)

A report released in December last year by Interactions (which was founded in 2004 and provides Intelligent Virtual Assistants that seamlessly combine AI and human understanding to enable businesses and consumers to engage in productive conversations) – entitled “The current state of customer care. How consumer preferences for channels and technology are evolving” – confirmed that in order to remain competitive businesses need to excel at customer care (the purchasing decisions being made by the majority of customers based on a company's customer service reputation). The results obtained on the basis of the survey designed by Interactions showed among other aspects (such as whether the respondents are interacting with a live agent or an automated service the human touch is a critical factor for them, their goal being of course to get their issue resolved as quickly as possible) that the customer service channel used by respondents during their most recent interaction was: Phone (57%); Email (17%); Web chat (11%); In person (9%); Social media (2%); Text messaging (1%); Instant messaging (1%); Other (1%). On the other hand, convenience (28%), the preferred contact methods (26%), the best method for the complexity of the issue (17%), the only contact method available at the needed time to reach out (12%), the method worked well when the company was contacted in the past (12%), the only contact information found (6%), were the reasons for why they chose a particular channel. (Interactions, 2017) It is worth mentioning within this framework that a Senior Field Marketing Manager at Interactions (Fox, 2017) underlined in December 2017 that AI is emerging as a worthy alternative to live agents for handling payments: 45 % of consumers having already used a virtual assistant, 73 % of those people indicating that they would be comfortable making payments through a virtual assistant; 54% of consumers prefer to be contacted about an upcoming payment by a virtual assistant over a live agent.

Implementing an adequate MarTech strategy, considering the blurring of boundaries between Marketing, Technology and Management

In September 2016 (HMM, Volume 6, Issue 3) we show that marketers need a holistic approach to customers as values-driven people, bringing different marketing channels together in a new way for new experiences, linking the customer experience (CX) to value, improving CX by moving from touchpoints to journeys, considering the impact of the new and emerging technologies, rethinking the tools and platforms, focusing on the customer technology stack, and developing a marketing capabilities platform. (Purcarea, 2016) Within this context we insisted, among other aspects, on some significant contributions, such as brought by:

- the Editor of chiefmartec.com, and the co-founder and CTO of ion interactive, Scott Brinker, who posted the 2016 Marketing Technology Landscape Supergraphic; Brinker recommended in 2014 to keep making forward progress because strategy, marketing, and technology are all intertwined, marketing technology being about experiences (not just about efficiency), the relationship between strategy and technology being circular (not linear), and being marketers' responsibility to understand technology;
- Travis Wright, Chief Marketing Technologist at CCP Global (2-Time MarTech Conference Speaker), who offered multiple topologies (including: Suite, Platform, Multi-Platform, and Bus) taken from Brinker's post from May 2015 on 4 topologies of integrated marketing technology stacks;
- Scott Stone, Advertising & E-Business Manager, Cisco Eagle, who made an interesting review of some key visualizations and diagrams – from the 2016 MarTech USA conference in San Francisco (underlining that such examples from the MarTech conference provide useful measurement in the future) – including one from the presentation of Isaac Wyatt of New Relic, who illustrated the workflow organizations should consider in developing a Marketing Capabilities Platform, as shown below:



Figure 3: Marketing Capabilities Platform

Source: Isaac Wyatt, 2016 MarTech USA conference in San Francisco, in "15 Key Visualizations & Diagrams From #MarTech 2016", by Edmond, D., 15 Key Visualizations & Diagrams From #MarTech 2016, March 31, 2016, retrieved from: <http://www.komarketingassociates.com/blog/key-visualizations-from-martech/>

▪ the Chief Marketing Officer and Executive Board Member of Millward Brown Vermeer (MB Vermeer), Marc de Swaan Arons, also recognized for spearheading the Marketing 2020 study where building marketing capability was identified as the most important of all strategic levers to drive competitive advantage; in an article published by Forbes in May 2015 Marc de Swaan Arons highlighted the benefits beyond revenue growth of a dedicated capability-building program, and ten tips for great marketing capability strategy development flowing from studying over-performers, pointing out the need of differentiating capabilities and prioritize (foundational versus transformational versus specialized), as shown in the tabel below:

Table 1: Differentiate capabilities and prioritize

CAPABILITY role	What it is	Delivery methodology
Foundational	Basic skills that all marketers should master	• Make all materials available online for all staff • Ensure senior staff is instructed to coach more junior staff & new comers
Transformation	Those skills that represent the unique Way of Marketing and set you apart from others	• In person session for senior audience to create profound understanding • Roll out for all staff that will transform the business
Specialized	Skills particular to a subset of the marketing or particular function	• In person session for selected functions only • Supplement with webinars per key topic to elaborate for non-primary target audience

Source: Marc de Swaan Arons, Building Marketing Capabilities to Fuel Growth, Forbes, May 20, 2015

▪ the Forrester Research analyst Lori Wizdo, and Marketo's Lou Pelosi, Sr. Director of LaunchPoint (on the occasion of a Webinar organized by Marketo in January 2016, Marketo underlining the need of investing in solutions so as to gain that 360-degree view of the customer journey - by automating, tracking, and measuring how people are moving across the entire customer lifecycle - starting from the reality of actionable data and insights that can enable greater personalization, engagement, and success), who showed that a comprehensive marketing tech stack can optimize engagement, and revenue can be driven by combining customer data with marketing automation.

Six month later, in March 2017 (HMM, Volume 7, Issue 1), (Purcarea, 2017) while approaching the real need of focusing marketing activity on creating customer value, we underlined that is important one hand to know company's value drivers, the way customer value is calculated (customer lifetime value, for instance), the current customer value, the desired customer value, the way marketing's contribution will be tied to this customer value (the most critical step), and on another hand to choose a means to measure marketing's performance within the context of the company's business value, in this process the following performance metrics table being very useful:

Tabel 2: Performance metrics

Marketing objective measure	Business outcome measure	Measure of performance	Business value result
X existing customers will adopt new solution Y	Adoption rate	Customer win rate	% increase in market share

Source: Patterson, L., Marketing Activity Metrics Mean Little: Here's How to Really Prove Marketing's Value, MarketingProfs, March 2, 2017

And in June 2017 (HMM, Volume 7, Issue 2), (Purcarea, 2017) we showed that for today's CMO: is critical (according to the "2017 Trends & Tech Guide for B2B Sales + Marketing" – co-authored by Prezi, Ambition and LeadGenius) to keep the pace with the quickly evolution of the technology landscape (using key tools such as analytics and reporting, and savvily handling data), so as to optimize marketing-sales alignment, report on pipeline performance, supply sales with educational content and assets, and manage full-funnel marketing teams; it is important (according to the eBook authored by 5W Decisions and entitled << Is a Chief Marketing Scientist a "Must Have" to Compete? >>) to working closely with the Chief Marketing Scientist (CMS, reporting generally directly to the CMO and playing as a creative thinker in a company, if there is a budget to support this position, as a full-time CMS or outsourcing it) by mixing data science, technology and marketing know-how with experience, so as to manage the Database Marketing Group, by creating a roadmap (in order to incrementally advance company's database marketing) based on an assessment of company's direct marketing capabilities, including a review of how well it optimize the concept (coined by 5W Decisions) so-called "5 W's" (Who to engage, with What message, Where, When and Why), and company's infrastructure in terms of people, tools, data systems and processes. While in September 2017 (HMM, Volume 7, Issue 3), we showed that: (Purcarea, 2017) as marketing has become a fiercely data-driven game (the democratization of data transforming the marketer's role in data analyst and ops expert), and shifted to a revenue center (as argued by Izsak, R., on July 13, 2017, spongesoftware.com), revenue-focused marketers are aligning with sales every quarter, creating plans that make sense, and knowing which metrics matter (such as: lead to opp conversion, campaign opportunity influence and ROI, email performance, funnel velocity, and ...happiness); the 2016-2017 Gartner CMO Spend Survey (according to Gartner's Contributor Chris Pemberton on January 10, 2017) revealed that CMOs now oversee or heavily influence CX, technology spending and profit and loss (P&L) performance as means to deliver growth; the CMOs of the future will need (as argued by Blake Morgan, a CX futurist, on May 22, 2017, within AMA's eNewsletters framework) eight skills (steers company strategy; presents a future vision to the board; embraces data and design; leads innovation and transformation; master of personalization; understands how to leverage AI, machine learning; curates content alongside customers; thinks like a CTO); the latest CMO Survey, Highlights and Insights, Report August 2017, revealed among other aspects, what makes a CMO most effective (the most critical to CMO role being first of all the voice of the customer at the leadership table). And more recently, in December 2017 (HMM, Volume 7, Issue 4), (Purcarea, 2017) we showed that providing prospects and customers with the right content at the right time and through the right channels is a

continuing challenge for all companies, the necessary strategies and processes while going on this way being enabled by the adequate technology, taking into account that the relevant engagements (as argued by Thomas Wieberneit, aheadCRM Ltd/movento GmbH) are made possible by a mix of business application platform, integration, and AI, as shown in the diagram below:

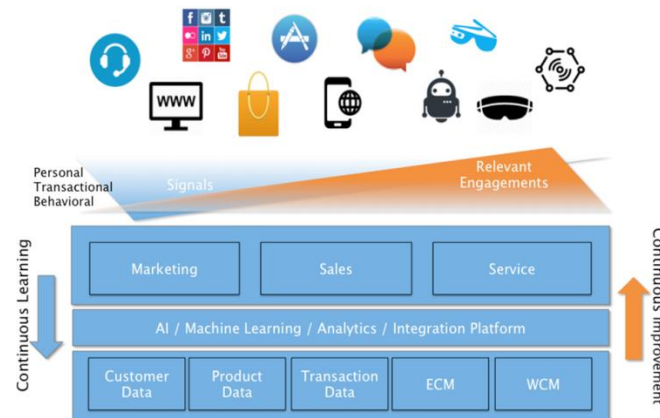


Figure 4: Business application platform, Integration, and AI

Source: Wieberneit, T., *How AI Can Mend the Marketing-Sales Gap*, Sep 21, 2017, CustomerThink

Having this mix of pictures in mind it is useful to also add now for the big picture other significant contributions, such as those brought by:

- the same reputed Chief Marketing Technologist Scott Brinker, who released in May 2017 the latest MarTech Landscape Supergraphic, (Brinker, 2017) attracting our attention on “The Platformization of Marketing Technology” (giving some examples of leading centralized platforms, of alternate approaches to platformizing martech, and of platforms sitting between the mentioned two extremes), as shown in the figure below:

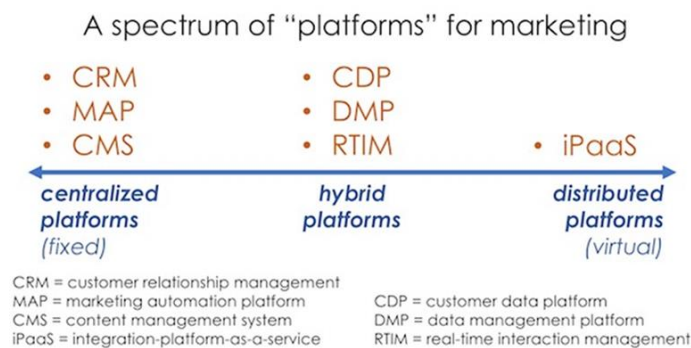


Figure 5: A spectrum of “platforms” for marketing

Source: Brinker, S., *Marketing Technology Landscape Supergraphic (2017): Martech 5000*, May 10, 2017

Brinker showed that as marketing is about differentiation, many marketers (instead of choosing suite or best-of-breed) are taking a suite and best-of-breed approach, gave two great examples (from Microsoft and Cisco) of such heterogeneous marketing stacks, and hypothesizing that the MarTech landscape (despite remaining quite large for some time) will increasingly have more structure in how it's organized (both in the market and in marketers' operations); it is also worth remembering that before the MarTech conference from May 9-11, 2017 in San Francisco, it was promoted (by Third Door Media, the producers of the MarTech conference and the publishers of MarTech Today) *Brinker's ebook "5 Disruptions Reshaping Marketing as We Know It"*, in which it was approached, among other aspects, the *democratization of Marketing* (the absorption of marketing elements by other parts of the organization, the only question being how this will be governed);

- (four month later) Scott Brinker at the beginning of October 2017 at the MarTech Boston 2017, when he delivered the *MarTech Manifesto* (Brinker, 2017) to a live audience, going beyond the narrow view of MarTech – marketing technology – as the intersection of three disciplines: Marketing, Technology and Management, to the *Grand View of MarTech* where these once separate disciplines are increasingly inseparable (the three circles of the Venn diagram overlapping almost completely), as shown in the figure below:



Figure 6: From the Narrow View to the Grand View of MarTech, Scott Brinker

Source: Adapted from Scott Brinker, *MarTech Manifesto*, 2017

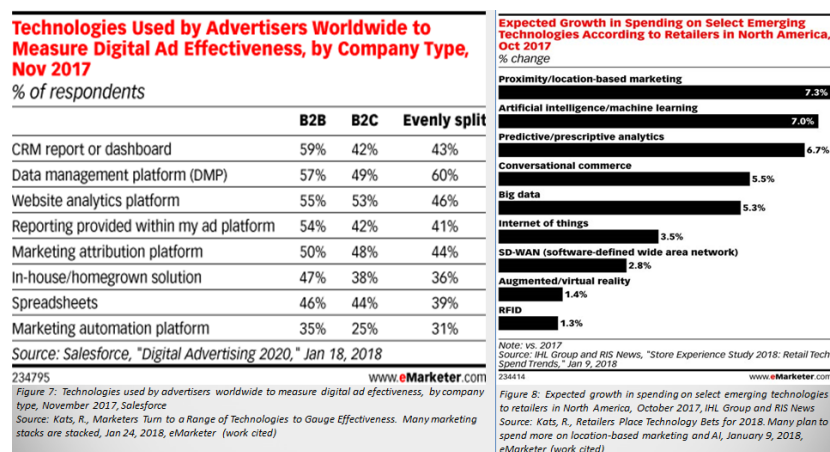
As argued by Scott Brinker, this Grand View of MarTech brings the customer into focus, considering the blurring of boundaries attributed to the digital transformation (tuning the people-process-technology triangle being the art of management, where imagination is its greatest resource, managers embracing distributed leadership, strategy becoming a shared vision that adapts to emergent opportunities through continuous experimentation, and brand ideal being made real and relevant every day) within intensifying global competition, accelerating technological change, and rising customer expectations;

- Web presence management and SEO company Conductor, which surveyed, in November 2017, 500 marketing executives worldwide (50% of respondents were from the US), revealing (as shown by eMarketer) the primary trend for which marketing executives

worldwide feel most unprepared in 2018: Artificial intelligence (AI), 34 % of respondents, the rates of the other technologies mentioned being as follows: Virtual/augmented reality – 29%; Voice search – 23%; New social networks – 11%; Other – 3%; (Kats, 2018)

▪ Doug Bewsher, CEO at Leadspace (the first B2B audience management platform; Bewsher has previously held positions as CMO at Salesforce and Skype), in December 2017 in MarketingProfs, by highlighting “The Three Crucial Steps to Building a Modern Marketing Stack” (*align sales and marketing along a single source of truth for data, and a common road map and definition of their strategic priorities; buying technologies strategically against clear, quantifiable business needs; buying MarTech that automates or speeds up the repetitive, tedious elements of their work so they can focus more on doing things technology can’t do - such as building and executing creative campaigns and content*), where he argued that a today’s basic requirement for marketers of every persuasion is to be technologically savvy, implementing a MarTech strategy accordingly. (Bewsher, 2017)

It would be also interesting to see how the above information relates (being confirmed) to other recent research findings brought to our attention by eMarketer, as shown below:



On the one hand, we can see above a somewhat similarity, in terms of the technologies, business-to-business (B2B) and business-to-consumer (B2C) advertisers use to measure their digital ad effectiveness efforts, from CRM reports or dashboards and data management platforms (DMPs) to marketing automation, as revealed by the study from Salesforce. (Kats, 2018) On the other hand, with regard to the spending of retailers in North America on a range of emerging technologies (including proximity/location-based marketing, AI/machine learning, predictive/prescriptive analytics etc.) we can see how they are planning to increase it in 2018 compared to 2017, the study from IHL Group and RIS News revealing that in order to provide a better CX or to understand shopper behavior retailers are continuing to incorporate various technologies (for example, such as experimenting with AI, using location data etc.). (Kats, 2018)

Customer-First Marketing and Customer-Centric Marketing. The beginning of a new era: Customer Success 2.0

We all know that reality as a fluid concept is changing itself from person to person, being defined by a personal belief structure. On the other hand, the “Godfathers of modern decision science” (Nobel-prize Winner Professor Daniel Kahneman and Amos Tversky) developed the concept of “Prospect theory” (considered foundational to the study of Behavioral Economics) that involves three big ideas: reference points (our decisions about things being highly influenced by where we started); diminishing sensitivity; loss aversion. (Shaw, 2018) In the same time, we all know that only by approaching the expectations and perceptions that a customer/user has about a company’s offered services his satisfaction can be measured. (Parasuraman, Berry, Zeithmal, 1991)

As shown at MarketingSherpa Summit 2017 (where participants had the opportunity of understanding how marketers at the world’s leading organizations are executing their campaigns in the digital era), improving company’s customer-first marketing (defined by MarketingSherpa as “*an approach to marketing that strives for the highest degree of customer satisfaction through deep understanding of customers’ needs and wants and creating a value proposition with valuable products and services that exceed their expectations*”) is a real challenge (as value chain matters to the marketer, value satisfied customers being far more likely to engage with every marketing channel, it is important to optimize every customer touch and to be understood, by being precise with company’s language used, proving the ability to more clearly articulate the proposed value), taking into account, among different aspects that:

- as reality is approximated in a perception process, and value is often appraised differently (being derived from a limited view of reality), the prospect’s perception process must be guided accordingly, involving fostering conclusions of value and creating a brand expectation (going beyond relying on a brand promise); (McGlaughlin, 2017) it is worth mentioning here that MECLABS (MarketingSherpa being a subsidiary of MECLABS Institute) is a science lab with a consultancy (its research analysts being led by Flint McGlaughlin, Managing Director), its methodology to customer behavior research having three defining characteristics: *scientific inquiry* (experimental science; it is tested the full spectrum of online marketing communications, from Web pages to email messages, banner and text ads); *real-world experimentation* (empirical research focused on real-world Internet marketing challenges and opportunities, the findings from these real-world experiments being added to the MECLABS research directory); *data-driven principles* (going beyond marketer’s intuition by using empirical, relevant data to craft and teach Internet marketing principles, and discovering the most effective way to get prospects to take the desired action);
- there are three questions of a strong CX (*who is the person within a company; who participates in the decision making as buyers, users or influencers; where do they get trusted information and what language do they use*), and it is important to align offers to the customer journey, every

interaction being relevant and driving the next action, not forgetting also that every engagement must have a purpose and everything must be put into a ROI context; (Sheinkin, 2017)

- crafting a complex content strategy involves: *to serve the individual customer, to find underutilized sources of valuable knowledge, to give content time to take hold, to execute by finding pockets of efficiency in existing streams.* (Shimp, G., Heidecker, 2017)

On January 25, 2018, on the occasion of a Thought Leadership Webinar organized by the Cloud-based CX intelligence leader InMoment, Inc., Salt Lake City (event based on the company's annual study of CX trends, which surveys both brands and consumers, having this methodology: US: 2,000 consumers / 1,000 brands; Same questions to find alignment / disconnects; Topics explored: Memorability, Personalization, New tech and new ways), Brennan Wilkie, Senior Vice President, Customer Experience Strategy, InMoment, drawn the following conclusions: *memorable matters; humans are key; millennials are not monolithic; tech to compliment, not confuse; CX stakes continue to rise.* (Wilkie, 2018) A day later, the Head of Customer Experience (CX) at Qualtrics, Luke Williams, (Williams, 2018) showed (on CustomerThink, the world's largest online community dedicated to customer-centric business strategy) seven ways technology will change CX in 2018: *improved churn prediction helps companies hang on to customers; customers expect instant service and delivery as a standard; consumer-to-manufacturer feedback takes a step forward; a new era for the Internet of Things (IoT); improved anomaly detection leads to better marketing; DIY service for routine problems becomes the new standard; better personalization through enhanced data.* In the opinion of Williams, in order to implement these new practices it is necessary to spend time and resources building equally new systems, acting on uncovering innovative ways to reach customers.

Within this framework it is also worth remembering that Qualtrics attracted the attention in 2010 on the approach of Justin Schuster (Vice President of enterprise products for MarketTools) regarding mastering "customer intelligence": *combine science and art; monitor your customer experience in real-time; close the loop; take your customers' advice; make customer satisfaction an integral part of your organization.* (Schuster, 2010) More recently, in October 2016, Jennifer Schulze (Vice President of Marketing for SAP) underlined the need of using customer intelligence tools to provide a holistic view of every customer, considering the transformation of data (understanding being driven by data, being considered pivotal to capture customer data from multiple touchpoints throughout the buying cycle and beyond) into predictive behavior insights with the help of these high-functioning tools, and creating a better CX by unifying customer engagement history quickly accessible by every department and addressing faster and with more personalized attention to the identified issues. (Schulze, 2016) While in January 2018 Jenn Vande Zande (Managing Editor of The Future of Customer Engagement & Commerce) showed that companies can collect and analyze data in real-time (personalizing CX based on what they know about a customer), with the help of AI in e-commerce (Chatbots, CRM, IoT, Sales, Product content management, Customer service, Automation).

On December 6, 2017, in New York, the reputed Association of National Advertisers (ANA, U.S.) showed that Artificial Intelligence (AI) has been chosen as the 2017 Marketing Word of the Year by the ANA's 403 selected members (from a list of finalists determined by ANA staff; the ANA's membership includes more than 1,000 companies with 15,000 brands that collectively spend or support more than \$400 billion in marketing and advertising annually) who voted online during the week of November 27. There were given examples of AI (such as: cognitive computing - e.g., IBM's Watson; driverless cars, voice-enabled digital assistants - e.g., Amazon's Alexa, Apple's Siri, Google Now; recommendation engines – e.g. Amazon, which uses algorithms based on data including a user's purchase history, items in the shopping cart, items rated and liked, and what other customers have viewed and purchased), also underlining the use of AI in marketing automation, programmatic ad buying, chat bots and customer service. On the other hand there were remember the last year's choices: "transparency" (in 2016), "content marketing" (in 2015), "programmatic" (in 2014, the first year the ANA conducted this survey). It is also worth mentioning that "influencer" was also one of the top choices in the 2017 (together with "transparency", "content marketing", and "programmatic").

In January 2018, the reputed American Marketing Association invited marketers again to express their opinion that counts regarding the Marketers' Confidence Index (a biannual survey that measures how optimistic U.S. marketers are about spending and growth in their organizations). A year ago, on February 23, 2017, AMA announced the results of the 2017 Marketers' Confidence Index survey (an online survey conducted by Kantar Vermeer in December 2016, among a sample of 304 marketers across the U.S.), showing that there is room for improvement", and highlighting from the very beginning that: "*CMOs see opportunities to better quantify ROI, drive customer-centric culture, understand rapid tech changes and invest in insight analytic*".

In the same month of January 2018, Lynn Hunsaker (CCXP; author of 3 CX handbooks; a board member of CXPA and ClearAction) pledged for the adoption of a mature approach of customer-centric marketing (concept described by Peter Drucker), considering: (Hunsaker, 2018)

- the signal sent in October 2015 by a Forbes contributor (following a study sponsored by Marketo), Christine Crandell, who showed that: *marketing is at a crossroad* between the customer (on one side) – the marketer being in the middle – and the brand (on the other side); the rise of customer co-created marketing is given to the fact that the buyer is in full control of vendor relationships (not just of the purchase cycle); (Crandell, 2018)
- three necessary steps: *co-create marketing with customers* (because customers and the influencers are increasingly controlling and communicating the brand message); *bridge silos of all kinds* (this being central to customer-centric marketing; considering that according to CMO Council, August 2017, the brand performance is impacted by the marketer agility and responsiveness); *dedicate budget and ownership wisely to CX excellence* (considering that according to the 2017 CMO Digital Benchmark Study, December 21, 2017, half of B2C

companies and a third of B2B companies have a dedicated CX budget etc.). (Leap Frog Marketing Institute, 2017)

Just a month before, Lynn Hunsaker identified solutions for 10 types of CX silos (organizational, channels, systems, data, processes, vision, assumptions, goals, metrics, handoffs), underlining four keys – broaden perspectives; expand motivations; nurture collaboration; build-in universality – to solve these CX silos. In other words, that is customer-centered business management, which is not yet a common practice. (Hunsaker, 2017)

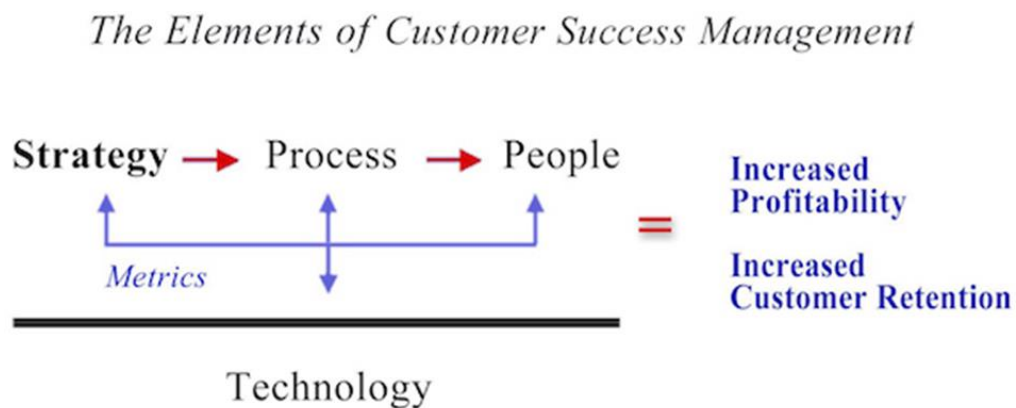
At the beginning of February 2018, Terri Maxwell (CEO and President of social impact-focused business cultivator Share On Purpose, a portfolio of brands) (Maxwell, 2018) argued (on the basis of the findings revealed by a study presented at a recent American Marketing Association conference), (Conick, 2017) that Marketing CEOs are typically more successful by inherently putting the customer first, and knowing how to position their products in the marketplace. She also underlined the opportunity of learning – even for those not coming from a marketing background – from successful Marketing CEOs such as Domino's Pizza (No. 1 in pizza delivery today) CEO J. Patrick Doyle. While at the end of January 2018, we find out thanks to AMA's Marketing News the opinion of Deloitte's first CMO (in March 2015 after working for Deloitte in various roles since 1985), Diana O'Brien, who five years ago took the responsibility to build Deloitte University. According to O'Brien, her role is of a champion for clients and a driver of growth (marketing not being seen as a cost center), being familiar with sitting in the C-suite, and having as responsibility to build Deloitte's reputation by creating powerful experiences and unique insights, and also by building lasting relationships with Deloitte's clients, being both a chief storyteller (helped by their own digital agency to craft a creative platform to emotionally connect to how they behave in the marketplace in favor of their clients) and the advocate for Deloitte's customers, being more proactive in satisfying and exceeding Deloitte's customers' expectations (by using data scientists, research and analytics to look at the data accordingly, and focusing on CX).

Impeding growth, the costly customer churn (customer attrition) was, is and will be a real challenge for all the companies (there are many ways to calculate customer churn rate), being a well-known fact that it is much less expensive to retain existing customers than it is to acquire new customers. (NGData, 2018) Only a holistic view of company's customers and their interactions across multiple channels can help to identify early signs of potential churn. (Burgelman, 2018) In order to improve customer retention (which is referring to the activities and actions took by companies to reduce the number of customer defections) many companies are using customer retention software systems, targeted customer retention plans, and customer experience management solutions that enhance customer retention rates. (Galetto, 2018)

The term “customer success” was coined by Salesforce, which became the leader in CRM software thanks to this focus on customer success. The major strategic shift made by Salesforce in 2014 is well-known, going from a sales-driven CRM company to one focused on long-term

customer success. Software-as-a-Service (SaaS) customer success expert Lincoln Murphy explained the meaning of customer success as simply ensuring that company's customers achieve their desired outcome through their interactions with the company. In SaaS case the term "customer success" became a weapon of choice to increase conversions, improve customer happiness, and decrease churn for recurring revenue businesses. And this because such a customer success approach is known as being especially important for software vendors (which have transitioned from one-time sales of on premise software to month-to-month subscriptions for SaaS). (Murphy, 2014)

On the other hand, customer success – according to Customer Success Association – is about customer relationship, retention, and optimization, the most effective way to keep company's customers being to make them as successful as possible in using company's technology product (sustainable corporate profitability and growth being the ultimate strategic goal of the customer success role). While "Customer Success Management" (CSM) is an integration of technology, marketing, sales, professional services, training and support into a relationship product for the SaaS/Cloud era. The elements of CSM (CSM initiatives starting out as reactive tactical teams so-called "churn fighters") are shown below:



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Figure 9: The elements of Customer Success Management

Source: Definition: Customer Success Management, Customer Success Association (work cited)

In January 2018 McKinsey's representatives Charles Atkins, Shobhit Gupta, and Paul Roche launched the question if software vendors and other companies can identify more opportunities to grow and deliver value by taking a fresh look at customer success, which is: becoming a growth engine that extends beyond software-as-a-service (SaaS) businesses; increasingly viewed as a cross-functional imperative for all functions of a company, as shown in the McKinsey's exhibits below: (Atkins, Gupta and Roche, 2018)

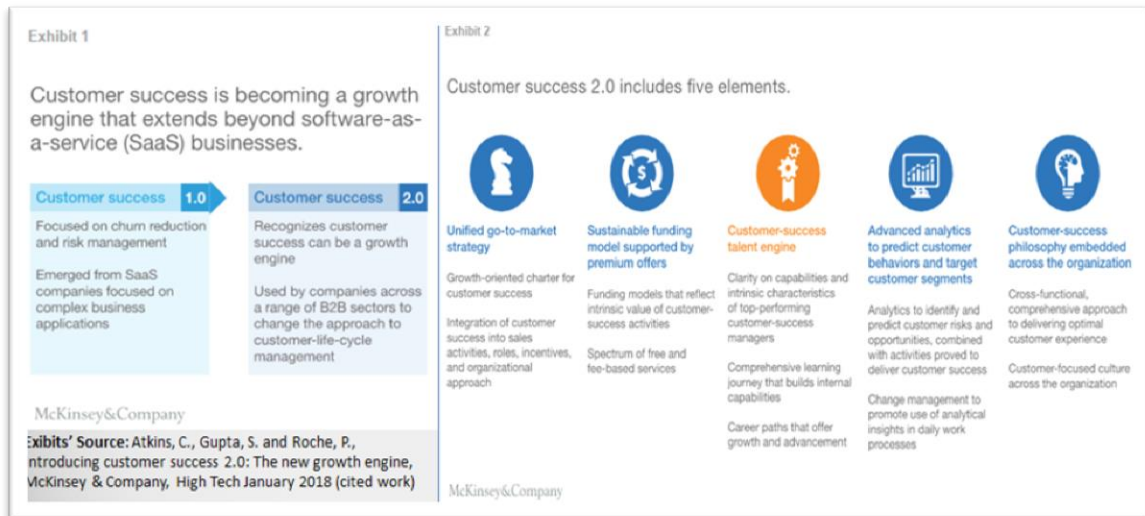


Figure 10: Introducing customer success 2.0 (I), McKinsey & Company

Source: Atkins, C., Gupta, S. and Roche, P., Introducing customer success 2.0: The new growth engine, McKinsey & Company, High Tech January 2018 (work cited)



Figure 11: Introducing customer success 2.0 (II), McKinsey & Company

Source: Atkins, C., Gupta, S. and Roche, P., Introducing customer success 2.0: The new growth engine, McKinsey & Company, High Tech January 2018 (work cited)

McKinsey's representatives showed that companies can: generate real impact by having all functions put the customer first (product experience being one of the top two drivers of

customer success); derive more value in return by identifying opportunities to deliver more value to customers; be finally helped to achieve their goals on both counts by a new approach to customer success (viewed as a guiding philosophy); be rewarded (for generating more customer value) by their clients with greater sales, more referrals, and increased loyalty (what represents the real value of customer success 2.0).

Instead of conclusions: Marketing discipline in full swing

We are witnessing a pledge for customer-centered business management which solves CX silos, and that more and more B2C and B2B companies are dedicating CX budgets (bridging silos of all kinds being considered central to customer-centric marketing). Putting the customer first, and knowing how to position their products in the marketplace, marketing CEOs are seen as being typically more successful. CMOs are seen as champions for customers and drivers of growth (impeding growth, the costly customer churn was, is and will be a real challenge for all the companies), creating powerful experiences and unique insights, focusing on CX, advocating for customers and exceeding customers' expectations by using data scientists, research and analytics to look at the data accordingly. Improving company's customer-first marketing, as defined by MarketingSherpa, is a real challenge, considering data-driven principles and not only, acting on uncovering innovative ways to reach customers. What presupposes also to use customer intelligence tools to provide a holistic view of every customer, creating a better CX, including with the help of AI, which has been chosen as the 2017 Marketing Word of the Year by the Association of National Advertisers (ANA, U.S.), and this within the context in which the American Marketing Association (AMA) underlined already from the beginning of the last year significant opportunities, such as driving customer-centric culture, understanding rapid tech changes and investing in insight analytics.

Looking at the above mentioned McKinsey's four exhibits we can see the step made from company's focusing on churn reduction and risk management (customer success 1.0) to recognizing customer success as a growth engine (customer success 2.0), opening a window of opportunity for an increased company's focus on CX. And perhaps the differences considered between B2B and B2C marketing are not so consistent with the currently perceived reality, if we take into account that: a company is run by people, both right and wrong decisions being based on emotion, and logic and emotion working in parallel; different points of the customer journey can be impacted by different emotions evoked by brands; (Weiss, 2018) the line between B2C and B2B selling (which always revolves around the customer) is blurred by the evolution of the technology and customer behavior in the new economy that is always demanding a customer-centric experience, many forward-looking companies already having a Chief Customer Success Officer. (Altschuler, 2017)

Three years ago, a debate around the idea (article posted on CustomerThink.com) launched by the reputed Bob Thompson (CEO of CustomerThink Corp., Founder/Editor-in-Chief of CustomerThink.com) with regard to CSM as training wheels for CXM brought to light true lessons to learn we are trying to synthesize and harmonize: it is a hard work to be customer-centric enough, but not too much, and focusing on customer success is a great way to find out what customers really want and to organize accordingly to deliver it profitably on the basis of a

company's informal social network and cross-functional work group learning by doing benefits of customer success (by identifying company's most valuable customers, customers' jobs-to-be-done, associated decision journeys, customers' desired outcomes, critical customer decisions, targeted improvements); only by understanding the relationship, emotion, channels and value delivery elements a company can achieve great customer success by creating success managers who understand how customer perceives success, taking into account that what it counts is the end to end customer journey; it is also important to better understand the coevolution of technology and capabilities (which occurs in four stages: technology implementation, capability co-evolution, organisational adoption, business transformation); customer success is a B2B term for customer retention, and it already seems to be going the CRM route. (Thompson, 2015)

This debate continued (on CustomerThink.com) and was relaunched in February 2018, when Sue Duris (Director of Marketing and Customer Experience of M4 Communications) raised the question if 2018 is the year CX and customer success converge, underlining, among other aspects, what she understood, after participating at SaaStr Annual 2018 Conference, San Francisco, Feb 6-8, 2018, with regard to the convergence of CX and customer success: true loyalty and advocacy are driven by being successful outside the product, combining the what (the product) and the why (the purpose in which it is used), the move of many customer success software solutions to a more customer-centric model being another indicator of this convergence; embedding more emotion analytics and metrics into customer success framework in order to drive convergence (which is already happening) will both enrich the customer feedback it receives, and help customer success (CS) understand how underlying emotions drive customer outcomes so as to generate deeper customer outcomes; CX will focus more on the specifics of onboarding (to combat churn), retention, and expansion in the customer journey (end-to-end customer journey maps) to help align customer metrics to business outcomes in order to drive deeper customer outcomes. Within this framework, very interesting comments were made again offering other true lessons to learn, such as: CS (largely a tactical extension of the selling process) and CX (more strategic, emotional and holistic) are related but different; CX (improving loyalty/retention is a key part of) has become an all-singing-all-dancing strategy, philosophy, movement, while CSM (to improve loyalty/retention it must remain focused on helping customers achieve their outcomes) is a subset; success is defined by the customer (not by the vendor), and focusing on CS presents an impossibly high bar, the same being the case for CX, a challenge becoming bridging the gap between a vendor's promise and the customer's assessment, also considering that customer acquisition and/or customer retention is a strategic decisional matter (which involves opportunities, risks, and tradeoffs), and that the root cause customer churn is attributable to incongruity between the company objectives and sales objectives; the goal of CS is to create customer value, the customer needs a good experience (not unnecessary experiences), from his point of view success being creating more value than vendor's competition; CS (which is about delivery, is about the experience of making your

customers successful practically) and CX are intrinsically connected and impacting each other but none will take over the other, and if ever happen, will be CS taking over CX. (Duris, 2018)

We can add that the development of the Marketing discipline is in full swing, outlining an evolution in the Marketing's logical sequence: learning and knowledge, feedback, action, CX, CS, innovation, ROMI.

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