

A Boxfusion & Oracle White Paper



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# MIND THE GAP

Bridging Gaps Between Sales, Service and  
Marketing to Meet Today's Customer Demands

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## Foreword

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*A recent study suggested that, by the year 2020, customer experience (CX) will overtake price and product as the key brand differentiator.*

Walker Information (2013), *Customers 2020: The Future of B-to-B Customer Experience*

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## A Foreword

**Neil Sholay**

VP of Digital Business EMEA, Oracle

### Customer Expectations: Think Apple and Uber

Over the last few years, exceptional customer experience (CX) teamed with an enhanced user experience (UX) has been at the core of what businesses are striving to achieve. Think Apple and Uber: two very successful brands whose web and mobile experiences are both engaging and intuitive. People want a complete and immediate purchasing experience, and brands like these deliver just that. If a customer doesn't get the same benchmark when he or she engages with businesses and enterprises, they'll be surprised and even disappointed. For example, an immediate purchasing experience might typically involve the integration of mobile with social. People today have much greater access to information. In a matter of seconds, customers have the ability to benchmark pricing and therefore the ability to make informed decisions that keep them in control of their own purchases.

So the question is: *'how do you meet those expectations whilst remaining competitive?'*

### It's All About the Micro-Moments

Information is now the key driver for business leaders looking to create quality CX. Whilst most organisations are already applying leading UX principles, some are not using the information they gather on customers adequately in order to truly leverage their investment in UX. Not only are they struggling to summon this information from across the key business functions, but they are also struggling to

create a completely dynamic view of this information that helps them make vital business decisions that shape CX and drive sales.

This leads nicely onto another key challenge: speed. A business may be able to gather the information they need, but if they cannot develop their platforms quickly enough, they'll quickly fall behind their competitors. Research suggests that people make up their minds on whether or not they like a brand in the first 50 milliseconds of viewing. If you can't deliver what a customer expects in those vital moments, people are more likely to move on to the next page—even a competitor site. For this reason, businesses are striving to be agile.

One final thing to note is that businesses are good at creating the customer journey, but we need to remember that customer journeys are fragmented and can be unpredictable. How do you engage customers and change the interactions in sync with such versatile customer behaviour?

### The Age of Supercharged CX

The rise of robotic technology, such as chatbots, machine learning and artificial intelligence (AI), has been a catalyst in the average consumer's need for speed. Many firms are now using chatbots to enhance and augment the call centre experience, which is a step in the right direction. However, some brands are losing sight of the importance of human judgement by completely removing the vital layer of human interaction with service. The smartest firms will use a combination of data, human insight and machine to really drive the best call centre service. This



approach will rocket in the next couple of years.

For the sales teams, compensation during this exponential time of change is essential. The compensation model has to be aligned with the way the customers want to purchase and bold, forward-thinking business leaders need to tackle this head-on to make sure it happens. Sales teams are driven by compensation, and if this doesn't fit with the buying patterns of consumers, sales teams will feel hard-done-by, resulting in poor or incomplete sales and complaints to the service teams.

To add to the pressure, brands today are now diving into an unprecedented level of creativity (especially in UX) and open-mindedness. They need to be unique and, in a way, disruptive. For larger firms, this might seem difficult to achieve given complex organisational architectures, technologies and processes but that doesn't mean to say it cannot be done with real impact and finesse. Larger brands have typically approached the requirement for super-creativity by either mimicking their smaller competitors, outsourcing, or even acquiring their competitors to directly obtain the talent pool.

Finally, and most daunting of all, businesses have built and executed the entire change programme internally, which requires innovative thinking and exceptional leadership.



*Emerging technologies are revolutionizing the concepts of how platforms are defined and used. The shift from technical infrastructure to ecosystem-enabling platforms is laying the foundations for entirely new business models that are forming the bridge between humans and technology.*

Gartner, 2016, *Hype Cycle for Emerging Technologies*

## A New Way of Thinking

Today, it's all about being extremely responsive. Brands are evaluating both their technology and their organisational structure. They are becoming familiar with technologies that remove siloes found in legacy architectures, and how this enables the technical freedom to be agile and to develop a multi-channel marketing strategy that goes beyond what they've ever done before. On the other hand, the organisation itself has to be responsive. Some larger companies have historically built their architecture by department, but are now looking to bridge the disjoint between lines of business with the aim of re-organising into 'tribes', working together regardless of who they report to. Others are flattening the organisational structure so that good ideas and creativity have the opportunity to reach the business leaders without delay.

In addition, businesses are aware now more than ever of the importance of employee wellbeing. It's about retaining employees who deliver exceptional customer service and ensuring that they are compensated adequately. Furthermore, training and support of the tools teams are using should be towards the top of the agenda for any digital transformation programme, just beneath a technology review. Technology needs to be intuitive. The saying '*Work is where we go to use old technology*' resonates here: it's possible today to download an app, have it installed at home and map it to your social media all within moments. If tools are rigid, disconnected and inflexible at work, productivity won't be at its best as employees won't want to use the tools.

Last, but not least, businesses are taking a new approach to who they hire as business

leaders. The best business leaders will have both IT and business thinking behind them, and will be brave enough to make radical changes to the organisation rapidly and as soon as it is seen as necessary.

## Stakeholders: Assemble!

The shift in tool purchasing power from the IT side to the business side is a well-known trend amongst businesses of all sizes and industries. This all goes back to the requirement to remain truly agile. As demands from customers have grown and requirements for technology have multiplied, lines of business have typically struggled to get buy-in from IT. As a result of this, we're now seeing instances whereby Chief Marketing Officers are recruiting their own architects and developers in order to implement new, innovative marketing technologies.

With this shift comes a wide range of challenges. For IT, there is a variety of different possible levels of involvement, each coming with its pros and cons. Some IT departments want to be involved, others don't see the benefits and therefore become demotivated. Some even take a back seat and leave the project work almost entirely up to the business unit. The business side, on the other hand, are well aware of the need to utilise technology in a customer centric way. However, this brings its own problems. Unless the lines of business work in a truly collaborative way, 'islands of innovation' can develop, just as they have done for many years through the more tactical approach. For example, a business might have three separate tools for content management, marketing and mobile.

Today, it is so important that different departments work towards a common end-state, in order to innovate and drive positive change. It's about assembling the right stakeholders (being operations, IT, marketing and increasingly human resources) and getting the buy-in across the business. Package that with an agile business model, the best levels of creativity and a sound training system, and businesses will be able to drive digital transformation that makes a real impact.



*"The saying 'Work is where we go to use old technology' resonates here: it's possible today to download an app, connect to home devices and map to social media in seconds. If tools are rigid and disconnected at work, productivity won't be at its best as employees won't want to use the tools."*

*Many organizations have multiple independent initiatives underway to improve performance...As a result, it's common to see individual functions reporting that they've achieved notable operational improvements, but customer satisfaction and overall costs remain unchanged.*

Bollard et al., *The Next-Generation Operating Model for the Digital World*, McKinsey, n.p. Mar 2017, Web. 28 Aug 2017



## A New Generation of Business Gaps

Bearing in mind the trends Neil has mentioned (in particular the pressures today to deliver innovation and new solutions at speed), it is no surprise that a number of significant gaps are revealing themselves between sales, service and marketing functions.

Perhaps the first place to look is within the sales division; specifically the increased emphasis on providing tools and solutions that assist teams to sell more effectively, whilst enabling management to track and analyse sales performance closely. With the well-documented high turnover of sales professionals within organisations, there is little scope for working with complex tools that require lengthy training programmes—in particular, getting up to speed on products and pricing models in order to generate quotes for prospective customers. As a result, sales leaders will seek rapid deployment of new tools to their salesforce, perhaps failing to recognise how disparate or incompatible the tools might be with each other. This way of thinking is understandable and quite common, but comes at the expense of a more holistic, strategic approach that considers the wider company requirements.

Within marketing teams, the pressures to innovate, get to market quicker and deliver exciting brand experiences can also lead to the purchase and use of disparate technology solutions for very specific use cases. This has generated another common gap, whereby important business information is not being fed to the other lines of business, resulting in missed

opportunities to fully develop business growth strategies. A good example would be that of prospect/customer activity collected and stored within marketing tools. Make this information directly available to sales teams - even better, in real-time or via automated reporting - and they'll be able to refine their sales strategies and approach with a clearer understanding of the market in which they are selling.

The other area of the business to consider is the customer service division, whom are now faced with the challenge of providing a truly multi-channel service that meets customer expectations for an outstanding post-purchase experience. There are great pressures in today's marketplace to provide this extra layer of CX but if decisions on technology solutions are taken in isolation within individual departments, it's possible that the sales and service departments become out of sync, not just in terms of the tools they use or the [lack of] integration between them, but also in the end-to-end CX they deliver.


*“Business leaders will seek rapid deployment of new tools to their salesforce, perhaps failing to recognise how incompatible the tools might be with each other. This way of thinking is understandable and quite common, but comes at the expense of a more holistic, strategic approach that considers the wider company requirements.”*

## Cracks in the Hi-tech Industry

As with many industries, price has historically been the key differentiator between companies but, as prices are driven down 'as far as they can go', hi-tech firms now need to differentiate heavily on service and the overall CX. In hi-tech in particular, the emergence of The Internet of Things (IoT) has driven significant investment in the search for enhanced CX.

But even where marketing leaders may be delivering new innovative experiences, the complexity of the industry's typical product catalogue and pricing book can result in downstream difficulties delivering that same desired brand experience; the gap here can be between the brand presented by marketing and the ability to deliver against the brand principles during the sales cycle.

Another challenge for the hi-tech industry is complexities often associated with global supply chain operations, stock control etc. and how this impacts and translates through to digital CX. The drive for new efficiencies in the back office can lead to changes that impact other areas of the front-office business and those departments can then find themselves unable to deliver on their targets and objectives.



*"In hi-tech, the drive for new efficiencies in the back office to support complex global supply operations can lead to changes that have a domino effect on the front office. As a result, sales, service and marketing are left unable to deliver on their targets."*



## The Leap Towards Total Customer Empowerment

Traditionally, when looking for technology solutions to meet new demands in the business, leaders would turn to the IT department for their solutions, but there has been a big shift in purchasing power and decision making from the IT side to the business side. This is mostly driven by the need for speed in deployment of new technology solutions; line-of-business leaders are taking the lead in acquiring the tools they need to deliver to the Board's expectations, which have in turn been driven by heightened customer expectations.

Within the sales and marketing arena, the pressure to deliver an innovative brand experience and the right offer at the right time (via whichever channel the customer desires) is very real. Mobile and social engagement is now a necessity for brands to include in their marketing and sales strategy and should also be a key customer service consideration.

These trends are influencing the way that firms support customer empowerment and engagement with their brand, to deliver a truly competitive CX. Unfortunately, keeping up with the demands of such market disruption is not easy and, when being addressed, can often expose problems either within departments or across the business operations.



*"Mobile and social engagement is now a necessity for brands to include in their marketing and sales strategy - and should also be a key customer service consideration."*

## Business Challenges: Exposing the Gaps

Against this backdrop of shifting consumer priorities, demands and attitudes, companies operating in the hi-tech manufacturing industry face a series of challenges; many of these are common to other industries but the nature of this sector means that some of the challenges are more complex. This is an industry sector which, of course, often sees complex product catalogues and pricing structures, throwing up a number of obstacles to efficiency in sales and marketing. On the service side, the technical support and service element is a key consideration for hi-tech companies.

So, as a result of the trends of the modern digital age and the specific nuances of the hi-tech industry, what gaps can be found that impact firms' ability to deliver leading CX?

Poor technology tools for sales, service and marketing teams (for example, in terms of their usability or their integration with other key technology) hampers the business. A great example seen regularly today is where one department (take marketing) has made a purchase to improve their own capability to deliver, but perhaps another department (e.g. customer service) has had little to no involvement in the decision-making to take on new technology. This leads to an inconsistent experience (a disconnect) between the marketing and services channels, triggering a considerable domino effect on how the brand is perceived by customers. We need to remember that this is the precise reason marketing will typically have decided to purchase new technology, to create a unified brand experience across their channel communications. Another example commonly seen might be where the tools provided to sales teams don't provide the teams with what they need to

improve their sales performance, leading to issues of 'tribal knowledge'. Here, specialist information that can aid sales, service and marketing strategy is not stored in company records and only known by one or two individuals. Over time, these individuals become the people others rely on for key information, and can result in bottlenecks that affect day-to-day business operations.

Some of the technology challenges within an individual department can also lead to slow or poor onboarding processes and this is very keenly felt within sales teams. Agility and forward-thinking within marketing or service teams can be undone by onboarding problems within the sales team. An area with notoriously high staff turnover anyway, it's often made more difficult in hi-tech due to the product catalogue size and complexity. More agile competitors (especially disruptive new market entrants) can pose a big threat in this circumstance. Companies need to look hard at enhancing usability, ensuring full support for mobile functionality and improving onboarding processes for sales team members to ensure they are more agile, both in line with the other areas of the business, and in response to the market competition.

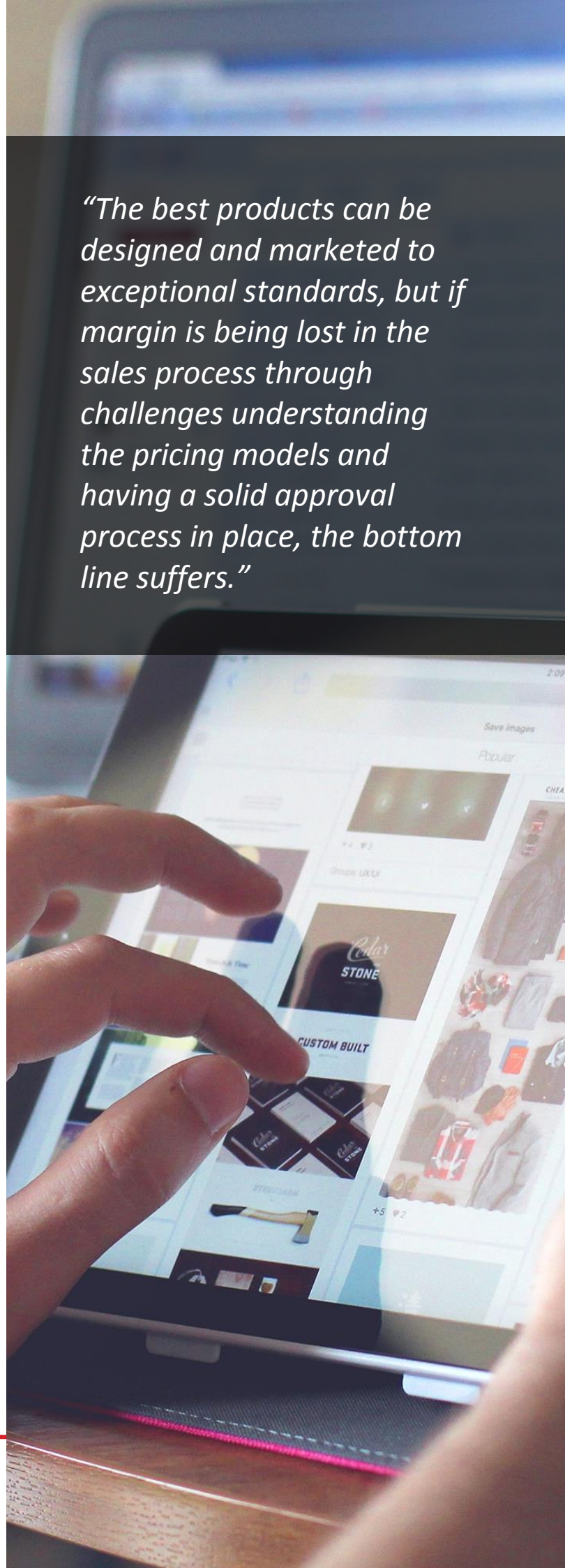
*"An inconsistent experience between the marketing and services channels can trigger a considerable domino effect on the brand in the eyes of your customers."*



In hi-tech, trying to drive improved sales figures in a highly competitive marketplace with complex product catalogues and pricing rules is a significant challenge. Here, agility is of fundamental importance. With products constantly evolving in such a fast-paced industry, hi-tech sales teams are commonly faced with the task of selling new product skews (most of which are pushed by the marketing teams). Unfortunately, it is often the case that new products—even product details—aren't being fed to the sales teams correctly or in a timely fashion. This puts added pressure on sales teams who, instead of building pipeline for the business, are forced to hunt down the right internal contacts with the product knowledge needed to develop opportunities. Furthermore, it's no surprise that the product and service information sales representatives are giving prospects and customers isn't accurate. As you can imagine, this reflects badly on the brand and can even lead to customer complaints. Another challenge that you might see as a result of a lack of agility is in margin calculations across the product catalogue, as a result of complex price lists and approval processes. The best products can be designed and marketed to exceptional standards, but if margin is being lost in the sales process through challenges understanding the pricing models and having a solid approval process in place, the bottom line suffers.

Beyond this already growing list of common challenges, we can also expect to see cracks emerge when channel partners are brought into the mix. Firstly, if a third party partner's sales team activity is not captured effectively on the firm's records, or if the latest marketing campaign material is not consistently used in the channel business, the efficiency of sales efforts across the whole business can be affected. Secondly, pipeline reporting can be difficult to

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produce with accuracy. Where a warranty is sold with a product via the channel business (thus capturing product and customer information to enable a link back to the customer record), there is still plenty to do to ensure the gaps in data are reduced or removed.

Finally, with warranties being an important aspect in carrying out business within the hi-tech sector, it is worthwhile highlighting the difficulties that exist managing them in a way that not only satisfies customers' demands, but also enables the business to benefit across service, sales and marketing channels.

Unfortunately, both the registration process and claims process can often prove to be disjointed affairs that frustrate the customer. Moreover (typically where the process is frustrating for the customer), this can lead to lost opportunities for the business. For sales and marketing teams. The customer registration process should represent a chance to gather valuable data about a customer and their purchases. In hi-tech, it's the perfect opportunity to gather information on purchases made directly through a partner, which in turn can be leveraged to develop and refine channel partner sales strategies. Until the registration process, the manufacturer will usually only be aware of the number of units that have been sold by particular partners. Today—with the right tools—it's now possible to collect individual customer data that can be used to gain valuable insights into purchasing preferences and behaviours. Of course beyond this, the customer care/service team will benefit from a warranty registration process that links the product purchased to the customer record and enables any later repairs and warranty claims processes to be handled with efficiency, in line with the end customer's expectations. The quality of

these services can be a real differentiator in today's market; meeting those heightened customer expectations is no easy task, but doing so may put a firm ahead of the competition.

*“In hi-tech, the customer registration process is the perfect opportunity to gather information on purchases made directly through partners. This can be leveraged to refine channel partner sales strategies and, in turn, bring the business and its partners closer together.”*

## Bridging the Gaps One Building Block at a Time

Striving to meet these challenges and business requirements should be a key consideration in any digital transformation strategy. A great starting point is to aim to get as close as possible to the business and their operations, analysing and challenging existing practice and processes. This sort of activity is typically—and possibly best—done with the help of an independent third party who can take a more holistic view and apply knowledge and learnings from elsewhere. Many organisations will employ customer journey mapping practice as a means to facilitate this process and this usually delivers great results.

Armed with the insights and learnings from an initial journey mapping or 'discovery phase', companies can start to identify the key pain points and disconnects that are impacting CX. From there, companies can work with external specialist support, taking on a digital education that builds on lessons learned in the wider industry then applying them to their internal challenges. Services and processes should be adapted and a technology roadmap drawn up – all with the aim of improving business agility and delivering an end-to-end, integrated journey.

When it comes to rolling out and implementing change programmes that connect and streamline digital strategies across the business, companies should be looking at a step-by-step approach—building block by building block—rather than a 'big bang' deployment. The most effective approaches tend to be those that focus on this kind of strategic approach, delivering many significant, incremental gains across the business pain points. If a company's most urgent challenges emerge

from gaps between the marketing and sales teams, you might look to stand up a new marketing automation platform that can be integrated with sales. Once you've addressed the implementation of a marketing automation platform, it might be time to switch focus to the gaps between the sales department and partner channels of the business, for example. The next building block might be to undertake a review of any gaps between customer service and marketing.

The long-term goals of this type of digital transformation programme remain vitally important to keep in focus; however, breaking the programme down can bring rapid results and build momentum within the business.

*“Armed with the insights from an initial ‘discovery phase’, companies can identify the key disconnects impacting CX. From there, they should take on a digital education that builds on lessons learned in the wider industry.”*



# BOXFUSION CONSULTING

## Closing the Seams through Oracle Certified CX Consulting

Boxfusion empowers businesses to take better decisions that bridge the gaps in sales, service and marketing, helping them deliver competitive CX by harnessing the benefits of Oracle's CX cloud product suite. With a razor sharp focus on business outcomes supported by a strong capability in user experience (UX) and key insight into the Oracle product roadmap, our certified experts have led firms securely through the journey to successful digital transformation.

Whether driving sales and customer service teams to leverage today's digital touch points throughout the entire customer lifecycle, or integrating technologies to realign processes and improve analysis and reporting, Boxfusion Consulting has helped its clients take full advantage of Oracle technology to reduce costs, gain better insight and drive true business agility.

If you're interested in finding out more about Oracle CX Cloud services, or how we can help you on your firm's journey to seamless online CX, contact us.



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Mr. Sholay's primary focus is market and business development which includes identifying new technology trends and developments and working closely with field sales & marketing to support Oracle's strategic customers.

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