



Intelligent CRM Connects Customers and Users

Chatbots can help CRM move from an internally focused information warehouse to an externally driven engagement tool, building relationships based on what is important to both customers and users.

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Posted Dec 5, 2016

As consumers continue to change the way they engage via social media, businesses must also adjust their approach to their customers. The use of private social networks like Everyme and Yammer and messaging apps such as WhatsApp and Facebook Messenger are on the rise: The messaging apps combined have almost 3 billion users, while the social networks count 2.3 billion users. Consumers are moving between private and social channels and engaging in multiple modes of communication. As a result, businesses are looking at how to engage within "dark social," the social sharing that occurs outside web analytics. Chatbots are the future of interaction within these private channels.

Chatbots are a conversational artificial intelligence (AI) capable of interfacing with both humans and other technology. These programs go beyond interactive voice response (IVR) systems to give companies more flexibility in the way they answer customer questions and increase the percentage of questions they are equipped to handle. They will be able to quickly understand the contextual request or problem rather than forcing the customer through a series of selection menus to understand the problem. They can be quickly accessed from desktop and mobile devices. Rather than force users to stop what they're doing and open another application, chatbots allow companies to inject themselves into the places where people are already communicating.

As organizations look to enhance their relationships with customers, the ubiquitous CRM system must evolve to meet the demands of both the customer and the CRM user. The software must move from an internally focused information warehouse to an externally driven engagement tool, designed to build relationships based on what is important to both customers and users.

Bots and Your Customers

Consumers are moving away from the browsers and apps to chat platforms for simplicity and convenience. Market research has found that 62 percent of people who downloaded messaging apps were still using them 12 months later, compared to just 11 percent of users of other apps, and daily sessions within messaging apps are almost five times greater than all other apps. Over 2.5 billion people have at least one messaging app installed, and that number is expected to reach 3.6 billion within a few years.

Gartner predicts that by 2019 requests for customer support through consumer mobile messaging apps will exceed requests for support through traditional social media. Since chatbots are not downloaded, they should provide a smooth experience for consumers. Rather than searching a website, consumers would engage the chatbot within their preferred messenger app. Content delivered via a chatbot would also be more relevant to the consumer. With social media integration, chatbots have a rich data source with which to understand user habits—regarding when they check their device, what their interests are, what events are scheduled, etc.—so bots can deliver updates, information, and recommendations that encourage engagement.

Chatbots could become the first interaction a consumer has with a business. For example, a customer utilizes a chatbot to check on their account balance and transfers funds from one account to another. In return, the bot might suggest that you set up an automatic transfer based on your past history of transferring similar amounts around the same time each month. The next interaction might be an inquiry about the current mortgage rates and the loan process. From there, the conversation thread would be transferred to a loan officer, to offer more in-depth information about credit qualifications and completing the loan application. At each step of the process, the conversation threads would be recorded in the CRM system, allowing greater insight into the customer.

Bots and Your Employees

Chatbots also have the potential to serve as a virtual personal assistant for the employee. A chatbot is a perfect tool to help develop the 360 degree view of the customer. Chatbots can be integrated into a company's own enterprise chat application, connecting and gathering information from across company-wide applications like CRM systems, Support Ticket systems, or even ERP systems. Such an integrated bot will give you all you need with just a few typed commands. Chatbots have the potential to resolve the data leakage issue in CRM. Garbage In/Garbage Out, as it relates to data, becomes less significant due to automation and smart AI. Potential results include increased customer retention and more accurate revenue forecasts. Chatbots add to the mobile experience as well. The information exchange becomes easier and more productive if you can access data within one mobile app.

Continuing the banking example, a chatbot within the CRM would provide the loan officer with the number of applications currently in underwriting, along with the list of priority tasks for that day. Rather than launching the CRM software, the service representative could tell the chatbot to attach the conversation to the customer record, which saves time. As machine learning continues, bots will enable the user to take action directly by presenting pertinent workflow scripts. For example, when a quarterly update on a key customer relationship is required by the executive team, a bot can present the user with a link to launch a workflow enabling a quick, efficient update script. Such an engaging experience surpasses the current "login-search-retrieve-act" paradigm of today's enterprise solutions.

Conclusion

Customers want organizations to react to their needs more quickly; to be able to maintain those speeds as the organization grows; to have someone engage with them when they need to connect with the organization; and to have experiences that are tailored to their needs. CRM users expect the same from their systems. While computing tools such as the AI chatbot can automate some job responsibilities, the technology won't be a replacement for most employees, as it isn't equipped to handle complex tasks. People and smart machines work better together. Chatbots have the potential to allow an organization to increase revenue, streamline internal processes, and improve data exchange across departments.

Imad Al-Abed is director of Onyx at Aptean and has more than 15 years of experience in the CRM space. Al-Abed started his career as CRM technical consultant and spent more than 10 years implementing and integrating CRM solutions for numerous clients across a variety of industries. During the past five years, Al-Abed has shifted his focus to CRM product management and is responsible for evolving CRM to ensure that client's needs are met. Al-Abed holds a bachelor's degree in electrical engineering from Boston University and has a master's degree (MSc) in management information systems from Concordia University (Montreal, Canada).