

IBM SolutionsConnect 2013

Turning Opportunity into Outcomes.



Puzzling: Finding the Missing Pieces of Your Customer Picture.

Giancarlo Sassi , BigData Segment Leader Benelux



Disruptive forces impact long standing business models across industries



Pressure to do more with less

“Data is the new oil. Data is just like crude. It’s valuable, but if unrefined it cannot really be used.”

– Clive Humby



Shift of power to the consumer

“We have an economy based on a resource that is not only renewable, but self-generating. Running out is not a problem, drowning in it is.”

– John Naisbitt



Proliferation of big data



The demand for big data solutions is real



The **healthcare industry** loses \$250 - \$300 billion on healthcare fraud, per year. In the US alone this is a \$650 million per day problem.¹



One rogue trader at a leading global **financial services** firm created \$2 billion worth of losses, almost bankrupting the company.



\$93 billion in total sales is missed each year because **retailers** don't have the right products in stock to meet customer demand.



5 billion global subscribers in the **telco industry** are demanding unique and personalized offerings that match their individual lifestyles.²

Source: 1.Harvard, *Harvard Business Review*, April 2010.

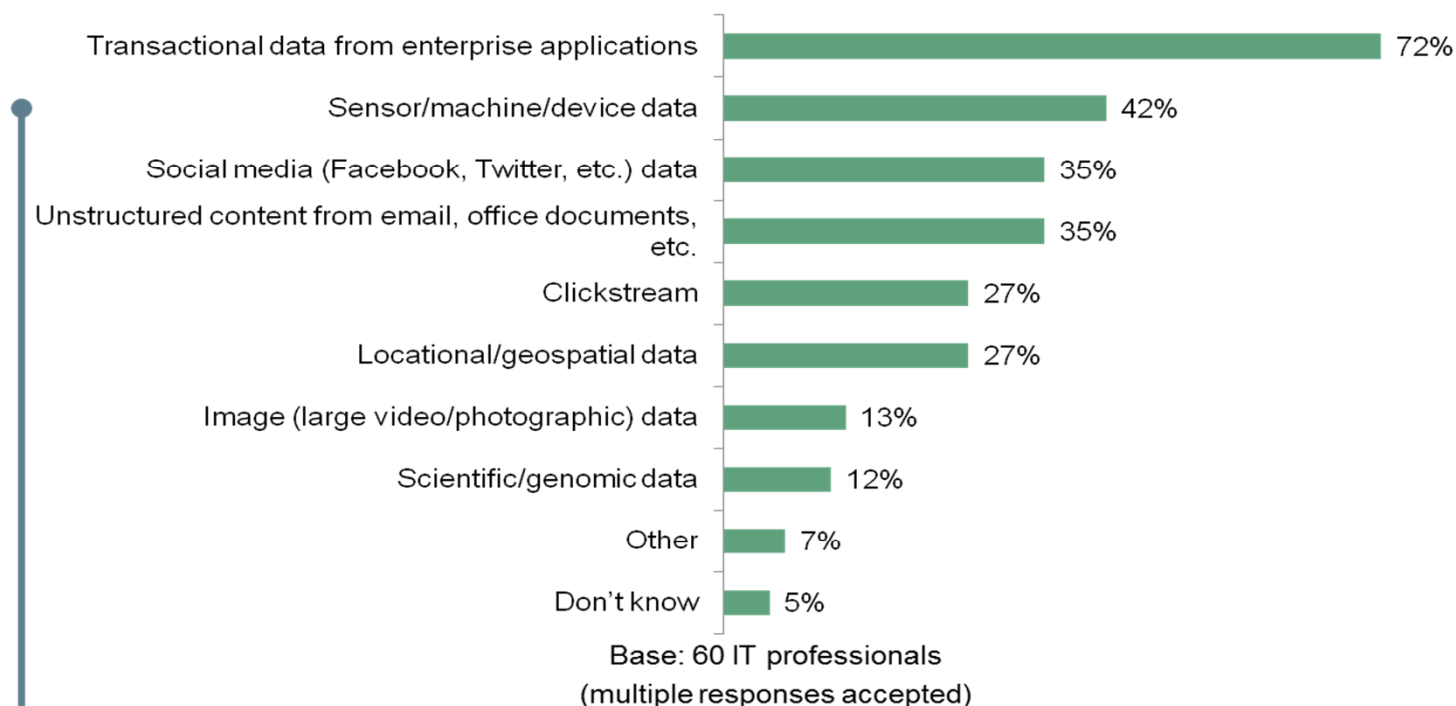
2,IBM Institute for Business Value, The Global CFO Study, 2010.



Requirement is to find, visualize and understand all big data

Big data: across diverse subject domains

“What types of data/records are you planning to analyze using big data technologies?”



Most big data use cases hype its application for analysis of new, raw data from social media, sensors, and web traffic, but we found that firms are being very practical, with early adopters using it to operate on enterprise data they already have.

Source: June 2011 Global Big Data Online Survey



Five key big data use cases



**Big Data
Exploration**



**Enhanced 360° View
of the Customer**



**Security/Intelligence
Extension**



**Operations
Analysis**



**Data Warehouse
Augmentation**



Enhanced 360° View of the Customer

Extend existing customer views (MDM, CRM, etc) by incorporating additional internal and external information sources



Enhanced 360° View of the Customer



Extend existing customer views (MDM, CRM, etc.) by incorporating additional internal and external information sources



Need a deeper understanding of customer sentiment from both internal and external sources



Desire to increase customer loyalty and satisfaction by understanding what meaningful actions are needed



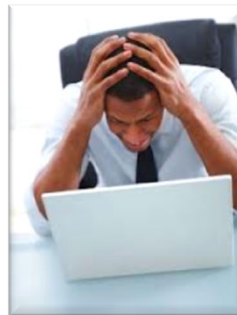
Challenged getting the right information to the right people to provide customers what they need to solve problems, cross-sell & up-sell



➤ Do you struggle to understand your customers?



➤ Do your customer-facing professionals struggle to get the information they need?



➤ Do they struggle to find the next question to up-sell, cross-sell and engage?



➤ Are you looking for ways to improve the customer's experience, increase customer loyalty and lifetime value, and receive referrals to new customers?

➤ Is your customer data scattered among many different systems, inside and outside the enterprise?



What if you could turn all of these challenges to your advantage?

Greater customer intimacy

- ✓ Know what customers want, why they buy, why they switch and what will keep them engaged and in the fold.



Better use of information at the point of impact

- ✓ Solve customer issues quickly and move on to revenue-generating conversations



Greater customer lifetime value

- ✓ Retain customers, enabling up-sell and cross-sell opportunities, rather losing them to the competition



A customer is a puzzle made up of many pieces



Contact Information
Name, address, employer, marital...



Business Context
Account number, customer type, purchase history, ...



Social Media
Social network, affiliations, network...



Legal/Financial Life
Property, credit rating, vehicles, ...

Every interaction requires someone to piece together parts of the puzzle



Professional Life
Employers, professional groups, certifications ...



Leisure
Hobbies, interests ...

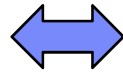
Information about your customers is dispersed, forcing your employees to extract it piece-by-piece

Etc....

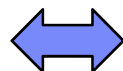


Individual silos can answer typical questions, one-by-one

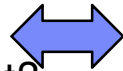
Who is this customer?



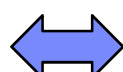
What products has she purchased?



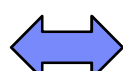
What issues has this customer had in the past?



What is her view of our company?



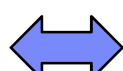
Where else has she worked?



What is available inventory?



How is her company using our products?



Who is best able to help this customer?



... but an enhanced 360° view provides answers in one application



Enhanced 360° View answers questions that require multiple systems

What products can I upsell this customer?

What impact will inventory have on her?

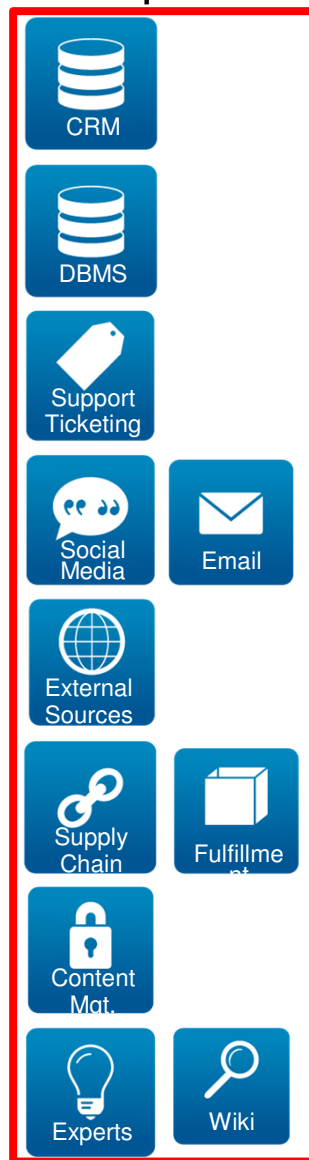
What marketing materials should I send?

What should I know before calling her for renewal?

What's going on with this customer TODAY?

How can we increase engagement with her?

How can we get more customers like her?



Fusion of data from multiple systems enables deeper insights—not just facts

Date	Amount	Product
2011-04	23k	845 Integrated Wall System
2011-01	25k	Penrex Integrated Wall System
2010-10	18k	QR 600 Joiger Recorder
2010-07	10k	Yellow Series 500 General Exam Light
2010-04	11k	TRE 20 Defbrillator





Making each investor feel like they're #1

Large brokerage and financial services firm

Leading provider of workplace and individual retirement savings plans, mutual funds and other financial products serves 20 million customers

Consolidated information from over 160 different silos to empower agents to engage high-value customers to promote up-selling and cross-selling





Leading Medical Equipment Supplier

(Blinded for confidentiality)

A leading medical device manufacturer delivers detailed knowledge about customers and products to their contact center agents to enable better engagement and asking “one more question” to increase cross-selling.

Business outcomes

- Increased revenue and decreased cost in the call center
- Increased customer satisfaction & employee engagement
- Created opportunities from each customer interaction - “one more question,” targeted to individual client situation

Product Starting Point: InfoSphere Data Explorer





Free Thermometry Device

When you purchase a 845 Integrated Diagnostic System. Download the coupon

Product offers based on past purchases and conversations

Owned Products

- 845 Integrated Wall System
- Pennex Integrated Wall System
- QR 600 Jolger Recorder
- Platinum Series ZW60 Hand Aneroids
- DuraShock Integrated Cuffs
- Yellow Series 600 General Exam Light
- Disposable Sigmoidoscope
- TRE 20 Defibrillator

Consolidated list of products owned based on account affiliation

Purchase History

Date	Amount	Product
2011-04	23k	845 Integrated Wall System
2011-01	25k	Pennex Integrated Wall System
2010-10	18k	QR 600 Jolger Recorder
	10k	Yellow Series 500 General Exam Light
	11k	TRE 20 Defibrillator

List of past purchases by this contact from order tracking system

Personal Information

Janet Robertson
Distributor / Purchasing Agent
Department: Purchasing
Office: Syracuse, NY
jrobertson@golisano.com
315.555.1212 x555

Contact information from CRM

Stop Tracking

Associated Accounts

- Golisano-Upstate
- Golisano-Strong
- Strong Memorial

Accounts associated with contact (past and present) based on info in CRM

LinkedIn History

Golisano Children's Hospital
Title: Distributor / Purchasing Agent
Years worked: Nov 2006 - Present

Golisano Children's Hospital
Title: Purchasing Agent

Information about contact from external sources such as LinkedIn

Real-time activity feed shows new content from many sources (DBMS, Salesforce, SAP)

Tambolin updated the document Golisano Contact Information. 1 days ago

Recent conversations from multiple sources: e.g., CRM, e-mail, etc.

Todd Williams updated the database Product History 845 - Activity History Golisano. Database - 3 hours ago

Chelle Kroll added the email address for contact Janet Robertson. Salesforce - 2 days ago

Conversations

Email: 845 Integrated Wall System Overview
Janet, please find an overview of the integrated wall systems that we offer. This is only a high level...
Exchange - 3 hours ago

Notes: Janet is new to the Transplant group, but has been a purchasing agent for 10 years
New to the 845 Series.
Salesforce - 2 days ago

Title: Kk Smith Introduction
Welcome Janet to Pediatrics at Golisano. I wanted to introduce myself...
Salesforce - 2 days ago

Email: Team, I just spoke to Golisano and Jeffrey Singleton has left Janet Robertson is replacing him and I...

My Products

- Canyon Mule Journey Backpack
- Course Pro Golf Bag
- Course Pro Golf and Tee Set
- Hailstorm Steel Woods Set

Show All

Featured Marketing Campaigns

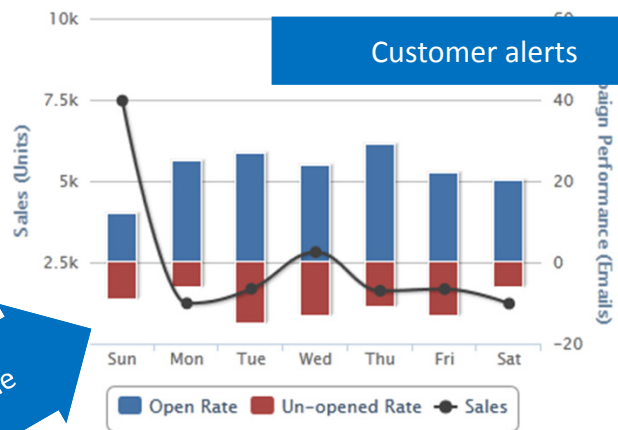
- Canyon Mule Journey Backpack**
For every 100 backpacks sold, retailers will receive a 10% discount
- Course Pro Golf Bag**
Retailers get 10% off on orders of 50+ Course Pro Golf Bags
- Hailstorm Steel Woods Set**
Free NFL merchandise with purchase of Hailstorm Steel Woods Set

Competitor News

TaylorMade Ghost Spider S Putter
According to TaylorMade, the moment of inertia measurement for the Ghost Spider S is 6,030. In golf terms, a higher MOI number means the putter is more resistant to twisting on off-center strikes ...
8 days ago

The technology in golf today is just amazing," said Player. "The products innovations by Callaway make such a difference all around have helped me continue to compete at a level that defies my age...
3 days ago
Source: WorldGolf.com
Callaway Golf Center Annual Tent Sale

Sales vs. Campaign Performance



Customer campaign analytics relevant to the user's profile

My Activity Feed

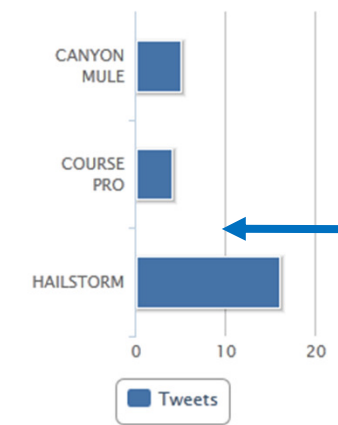
- Filter Feed
- What's new?
- Post
- Frank Gelato** removed supplier report **Golf supplier report** from **James**
cxo 1 day ago
 - Frank Gelato** added supplier report **Golf supplier report** to **James**
cxo 1 day ago
 - Eric Carson** added sales briefing **Golf line sales briefing**
Show changes for Description
Sales Briefings 6 days ago
 - David Piper** added supplier report **Golf supplier report**
Show changes for Description

Customer insights from Activity Feed

Top Retailers by Revenue

- Consumer Club
- Algonquin Camping Supplies
- The Sport Pros
- Jackson Sporting Goods
- Barry's Discount Golf Shop

Intent to Buy



Social media analytics From streaming content

Recent Tweets

- @SetNielsen** (203 followers)
Who will buy this junk Course Pro Golf and Tee Set. Crappy! Hate it!
2 days ago
- @lizmartin33** (291 followers)
@goftman I want to buy the Hailstorm Steel , what do ya say?
2 days ago
- @WandaWilliams** (983 followers)
Who will buy this rubbish Canyon Mule Journey Backpack? Hate it!

Contextual monitoring of customer views in outside data feeds

Shared Spaces

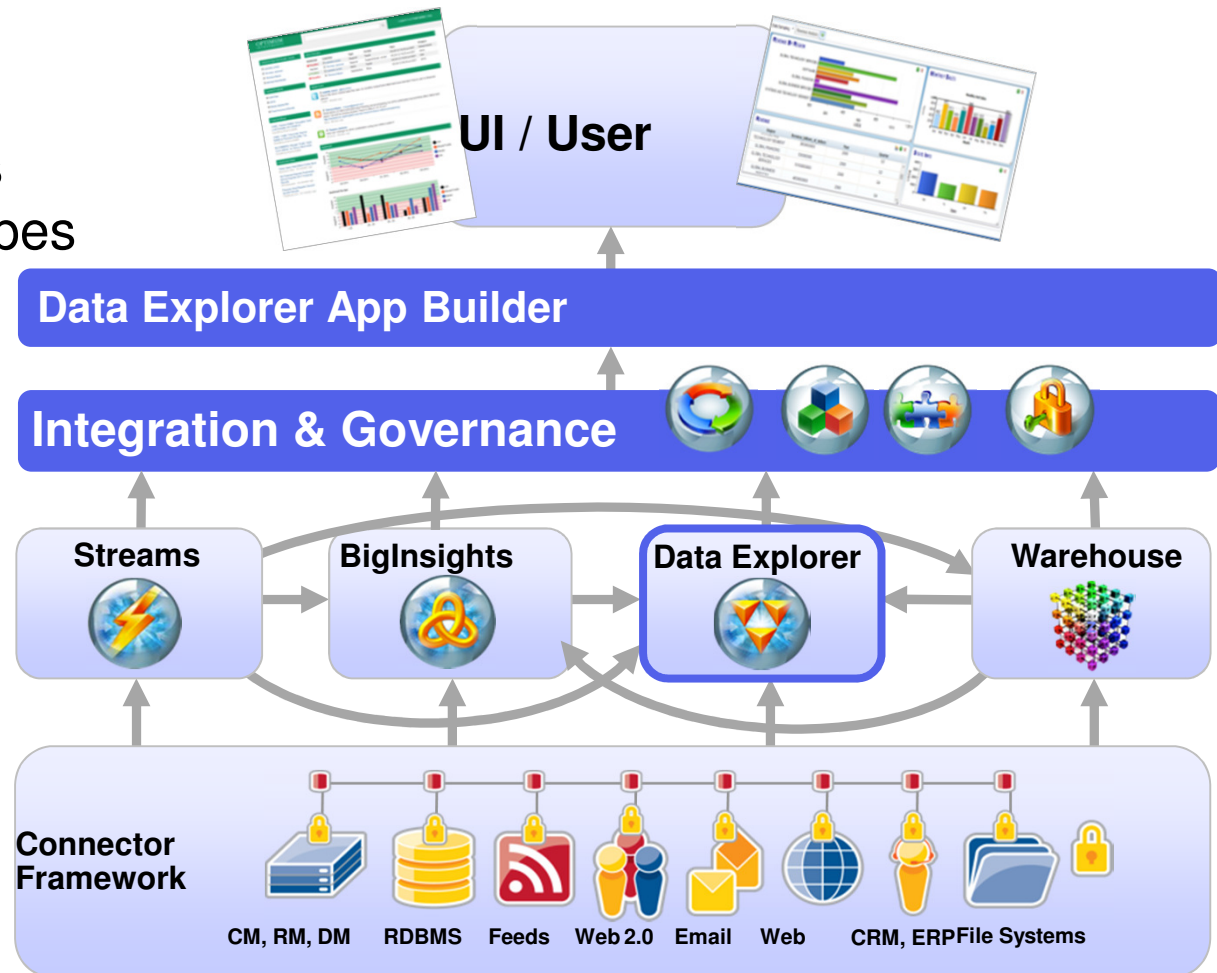
Leverage the full power of IBM's Big Data Platform

Compelling applications incorporating all data types and sources

I&G ensures veracity

Integration leverages core components of the platform

Secure access to a broad range of enterprise systems



Enhanced 360° View is complemented by master data management

SOURCE SYSTEMS



CRM
Name: **J Robertson**
Address: **35 West 15th**
Address: **Pittsburgh, PA 15213**



ERP
Name: **Janet Robertson**
Address: **35 West 15th St.**
Address: **Pittsburgh, PA 15213**




Legacy
Name: **Jan Robertson**
Address: **36 West 15th St.**
Address: **Pittsburgh, PA 15213**

Master Data Management



360° View of Party Identity




First:	Janet
Last:	Robertson
Address:	35 West 15th St
City:	Pittsburgh
State/Zip:	PA / 15213
Gender:	F
Age:	48
DOB:	1/4/64



OPTIMUM INVESTMENTS

Logged in as Frank Gelato | Help

Home > Janet Robertson



Personal Information

Janet Robertson
Senior Regional Sales Manager
Department: Sales
Office: Pittsburgh, PA
jrobertson@wakefield.com
412.422.2499 x555

Stop Tracking

Associated Accounts

- Wakefield Investments

LinkedIn History

Wakefield Investments
Title: Senior Regional Sales Manager
Years worked: Nov 2006 - Present
Morgan Stanley Smith Barney

Purchase History

Date	Amount	Fund
2011-04	23k	Western Asset U.S. Treasury Reserves
2011-01	25k	Optimum Short Duration Municipal Income Fund
2010-10	18k	Optimum Dividend Value Fund
2010-07	10k	Optimum Batterymarch S&P 500 Index Fund
2010-04	11k	Optimum ClearBridge Large Cap Growth Fund

Contact Activity Feed

Showing: **All Activity** | By Source | By Author

What's new with this contact?

Add Comment

Irene Tambolin updated the document Wakefield Contact Information. SAP - 1 days ago

Todd Williams updated the database Product Funds #322245 - Activity History Wakefield. Database - 3 hours ago

Chelle Kroll added the email address jrobertson@wakefield.com to contact Janet Robertson. Salesforce - 2 days ago

Frank Gelato commented to Janet Robertson: "Scheduled a meeting with Janet for next week. I'll let everyone know how it

Owned Products

- Optimum Bond Fund
- Western Asset U.S. Treasury Reserves
- Optimum Western Asset Short Duration Municipal Income Fund
- Optimum Dividend Value Fund
- Western Asset New York Municipal Money Market Fund
- Optimum Western Asset Oregon Municipals Fund
- Optimum Special Equity Fund
- Optimum Western Asset New Jersey Municipals Fund

Recent Conversations

Email: Optimum Fund Management Overview
Janet, please find an overview of Optimum and the funds we offer. This is only a high level...
Exchange - 3 hours ago

Notes: Janet is new to Wakefield but has been a wholesaler for 10 years New to Optimum Funds.
Salesforce - 2 days ago

Title: Optimum Introduction
Welcome Janet to Wakefield. I wanted to introduce myself...



Unified View of Party's Information



Important value pillars for the enhanced 360° view

Improve direct customer interactions

Empower customer-facing professionals

Leverage existing data and knowledge

Create efficient, meaningful and profitable interactions

Increase quality and use of analytics

Enable use of information from multiple data sources

Put analytics in context!
Integrate analytics with customer views to empower front-line employees

Improve Web-based self service

Empower customers to leverage information

Leverage recommendations and “next best action” analytics

Reduce cost of routine interactions while improving customer loyalty



Take-away - ask yourself these questions

When someone in your organization wants to view all information about a customer, product or competitor how do they go about it? How many different systems do they need to access?

Have you considered the impact on your business of not providing a single point of access for all customer-related business? Lost productivity? Opportunity cost?

Are you able to weigh insights about your customers from social media, surveys, support emails and call records in context with information from transactional systems?

How would a complete view of the customer enhance your line of business? Are there specific business outcomes you are looking for?

Are you able to combine your structured & unstructured data together to run analytics & create a more consistent view of your customers?



Get started on your big data journey today

Learn more

- IBM Big Data platform webpage
- IBMBigDataHub.com
- Big Data University
- IBV study on big data
- Books / analyst papers

Schedule a Big Data Workshop

- Free of charge
- Best practices
- Industry use cases
- Business uses
- Business value assessment



THINK

BIG

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