

A playbook for transforming the front office

Navigating uncertainty
through resilience

KPMG Customer Advisory

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Introduction

Uncertainty can often overshadow strategy, minimizing wins, magnifying risks, and rendering it ineffectual. When the specter of the unknown fuels decision making, it can curtail investment in customer experience innovation and the technical architecture behind efficient workflows—both critical engines of sales resilience.

Perspective, however, transforms the impact of the unknown. It allows leaders to reimagine uncertainty as an opportunity to create new strategies that promote resilience and revenue growth simultaneously.

When perspective drives investment choices amidst uncertainty, sales, and marketing teams learn how to achieve more with less.

Perspective leverages context to improve the tools that put a strategy into action. Modern sales enablement technology becomes more efficient, and analytics tools produce data that offer granular insights that help front-office leaders create seamless, personalized customer experiences – interactions that result in loyalty and new conversions.

Together, the right technology and human expertise can unearth new workflow efficiencies, allowing sales and marketing teams to direct human resources to the areas that deliver the most value.



Creating a data-driven digital revenue optimization strategy

Resilience is perspective in action—a series of choices born of a specific way of seeing uncertainty. It allows teams to optimize their time, talent, and technical resources and make improvements in performance feasible, more impactful, and seamless to launch. It reimagines customer needs as the foundation of business resilience. That kind of transformation necessitates realigning sales and marketing operations with long-term revenue objectives.

When intuitive, frictionless customer experiences become the benchmark for every consumer or client interaction, it fundamentally changes how data and technology are used within the organization.

The realignment of strategic thinking around resilience requires connecting the dots between business revenue goals and day-to-day decision making. It means no more siloed data between sales and marketing teams or guesstimates on performance. Instead, it demands a clear, detailed communication of long-term revenue objectives and the changes in workflow efficiencies required to meet them.

Resilience relies upon data as an infrastructure for managing change and navigating uncertainty. However, not just any data culled from customer feedback or sales reports will do. Instead, useful data is contextual, prescriptive, and actionable—offering an insights-backed perspective on what to do right now and why.

While a robust analytics suite will render insights that can map sales and marketing performance to business goals, human guidance is needed to translate the story your data tells about your business into action.

Perspective is context. The translation of data into an instructive narrative allows teams to anticipate risks to revenue flows and customer engagement. It does this by presenting historical data and real-time insights as directives for new ways of connecting with customers or managing sales processes.



Perspective allows leaders to assess the impact of change and prepare effectively for it. It makes risk quantifiable, even if uncertainty itself is not.



Leveraging data to build resilience requires human expertise and advanced technology to amplify each other's value; Technology cannot automate purposeful innovation of its own accord.

Data is a versatile catalyst. The increasing volume of data adds to administrative burdens, often draining front-office productivity. On the other hand, data unlocked by analytics technology can ignite marketing innovation, amplifying front-office performance. The difference is perspective. Leveraging data to optimize revenue starts with gaining a clear perspective on the role of data in your organization.

Here are three questions to ask:

1

Is there a misalignment between revenue goals and front-office performance?

Marketing and sales teams may struggle to optimize performance when revenue benchmarks, customer engagement strategy, and sales enablement tools use different or incomplete data sets.

2

Are revenue vulnerabilities mapped to gaps in insights across the entire organization?

Effective revenue management starts with identifying the processes, workflows, and strategies that produce failure, along with the gaps in insights that cause suboptimal decision making.

3

Are real-time insights available to all stakeholders and embedded with new strategy recommendations?

For example, insights drawn from customer data can be used to sculpt detailed marketing and sales strategy from broad business directives, connecting day-to-day customer behavioral patterns with long-term revenue benchmarks.

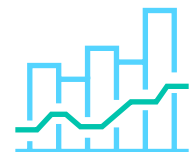
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Analytics tools can help improve the performance of front-office operations, assisting teams in sifting through pathways to potential outcomes to find optimal results. If your organization's existing data strategy has failed to identify new revenue optimization strategies, here are four steps to take:



Step One:
Make data-driven insights actionable

Leverage real-time data to assess and adjust KPI standards, measuring performance within the context of new insights. As analytics tools uncover key trends, patterns, and relationships pertinent to front-office teams decisioning, they streamline insight distribution across the organization. Ensure that new insights communicate a hierarchy of action items prioritized in alignment with current revenue goals.



Step Two:
Map a revenue optimization strategy

Identify metrics showing positive trends from anywhere in the organization and assess their relevance for front-office teams' workflows. When collaboration between departments and data sharing is appropriate, map revenue optimization efforts to interdepartmental collaborations that data indicates will improve efficiencies.



Step Three:
Launch a cost optimization plan using real-time analytics

Use real-time analytics tools to distribute insights on audience segmentation, sales process optimization, and customer retention. Identify areas where measurement, monitoring, and sales enablement technology could be enhanced by cost-saving innovations such as task automation at scale.



Step Four:
Establish new resource-aware benchmarks for marketing and sales performance based on revenue strategy

For some front-office teams achieving the above is complicated by a lack of access to advanced analytics tools. When this occurs, a "plug and play" tech solution that can augment or replace an inefficient tech stack may be a cost-effective option.

Pro tips:

- Marketing intelligence and analytics access can be more efficient when cloud-based for scalability.
- Managed integrations with existing systems can streamline innovation efforts.
- Look for tools that offer integrated customer segmentation, automated multichannel journeys, and lead management functionality.

Why DIY data solutions rarely work

When revenue pressure drives cost-cutting initiatives, front-office teams must often find creative ways to justify budgets and further investment. Unfortunately, siloed data between sales, marketing, and other departments can make this a nearly impossible task.

Disparate or inconsistent data reporting may present an inaccurate portrait of sales and marketing performance. In addition, the DIY approach to data—collecting sales and marketing data manually and using limited or no automated analytic solutions—can be slow, error-prone, and produce skewed findings due to a lack of data freshness.

In addition, critical front-office resource allocation decisions might be based on thin, inaccurate, or noncontextual data. The solution? Front-office teams must show, rather than tell, their organizations that analytics and data have tangible and extensible value for their companies.

Not every analytics suite is created equal

Every “enterprise-grade” tool does not offer the same level of analytical capabilities. The most powerful analytics tools can introduce new typologies of customer insights to front-office teams.

From customer behavioral analytics to consumer sentiment analysis, the right analytics tools can add structure to raw data and transform it into findings that provide granular insights into how and why customers choose to purchase and why they might disengage.

For sales and marketing teams, the most powerful analytics suites can unlock potential obscured by inefficient processes, making existing resources more valuable and teams better equipped for new challenges.

Case study: Leading from the front through data and analytics



How KPMG LLP helped an industry leader develop a successful marketing analytics program to counter pressure in emerging markets

After it found a home on consumers' phones worldwide, this category-leading mobile application faced growing competition in the U.S. and many international markets.

KPMG helped the company develop a data-driven approach and advanced analytics models to measure marketing return on investment (ROI) by channel and country and build an optimization engine that allocated the budget for maximum impact in each market.

Today, the company's targeted, data-based approach gives the entire leadership team, from CMO to CFO and CEO, confidence and agility in its marketing decisions, along with significantly improved results.

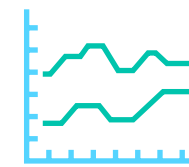


When fully implemented, these tools have the potential to enable the client to:

- Gain greater insight into marketing's impact on sales
- Offer precise measurements of marketing ROI
- Leverage custom tools and models to optimize marketing investments
- Generate thirty percent more revenue from marketing with the same marketing budget
- Build CFO and CEO confidence in marketing's effectiveness

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Four ways analytics can transform front-office operations:



Predictive analytics: identifying engagement drivers

An advanced analytics tool can interpret historical marketing and sales data using complex algorithms to assess customer sentiment and user experience preferences and predict future purchasing choices.



Churn prediction: minimizing customer attrition

Advanced algorithms powered by machine learning can identify behavior patterns that may indicate potential customer loss, allowing front-office teams to develop strategies to reengage customers.



Audience segmentation: creating personalization insights

Analytics tools can process millions of data points to reveal unique behavioral patterns among look-alike audience segments, allowing for the development of highly personalized customer experiences.

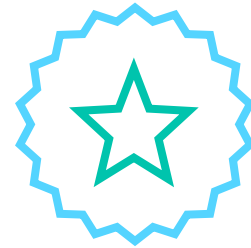


Customer acquisition: streamlining lead generation

An enterprise-grade analytics suite can provide insights that allow marketing and sales teams to identify the channels and types of interactions most likely to yield conversion.

How front-office teams can leverage data to drive performance

To develop an effective strategy that boosts ROI, sales and marketing teams need unfettered access to granular insights on customer behaviors and a robust CRM suite. For many businesses, using a single solution offering integrated data management and analytics has allowed them to bring front-office teams closer to the data that drives performance.



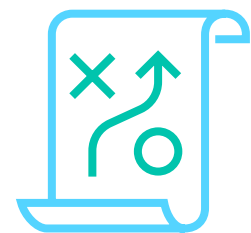
Assess the quality of first-party data

Determine how much and how well managed existing sales and marketing data sources are and if the flow of clean, new data is regular and easily accessible by the entire team. If sales and marketing data are siloed, choose a data management tool that offers a singular view of performance insights.



Review current analytics tools

The most valuable insights look at relational databases to unearth patterns of results within relevant contexts, such as sales, marketing, and customer service. However, insights are only as relevant as the data they are drawn from; ensure that analysis tools are robust enough to provide transparent insights over multiple business segments.



Choose the right solution to amplify data and analytics capabilities

When data and analytics tools cannot produce ready, actionable insights, marketers should look to a solutions partner that can provide integrated data management and analytics options and active advisement on strategy. Guidance in selecting the right tools to get the most value out of data is essential to create scalable marketing and sales strategies.



Executive Q&A: Using digital transformation to create resilience



Dave Klimek
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How have clients used data to develop a strategy to navigate uncertainty?

Interestingly, most clients in the service experience space use incorrect data to make decisions. That has been true whether it is channel analytics and looking at interactions from digital or AI to voice channels, operational metrics—which are typically in conflict with the stated strategy—or customer sentiment—which is often misdiagnosed as a “score.” Instead, more mature clients use data to buck traditional trends and thinking and unlock hidden value.

How do organizations determine if they optimize spending when investing in sales, marketing, and service teams?

Most organizations need help to manage this (in-service experience). Most fail to tie spend to outcomes, and it becomes this paper-based exercise in which benefits far exceed their OPEX. It is more difficult because so many things are hard to isolate. I have seen organizations use a “try-before-you-buy” approach, especially in technology, where they isolate the change in a live customer environment in a tech-light solution to see if they achieve measurable benefits. If so, they would move to the complete implementation phase and then continue to measure outcomes.



Conclusion

Amid economic uncertainty, the synchronization of sales and marketing teams' workflows with revenue optimization strategy is an imperative. Yet siloed data and legacy technologies can hinder cooperation and agile decision making critical to business resilience.

With access to modern data tools and intelligent automation, these teams can streamline their workflows and cultivate benchmarks that enhance competitiveness, optimize resources, and ultimately drive sustained growth.

About KPMG Customer Advisory

KPMG Customer Advisory helps some of the world's leading marketing, sales, and service professionals make the right investments that deliver meaningful, sustained growth. At every step, we deliver insights that help you make decisions with precision and confidence. Together, we'll turn opportunities into tangible, transformative results. Let's start the conversation.

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