

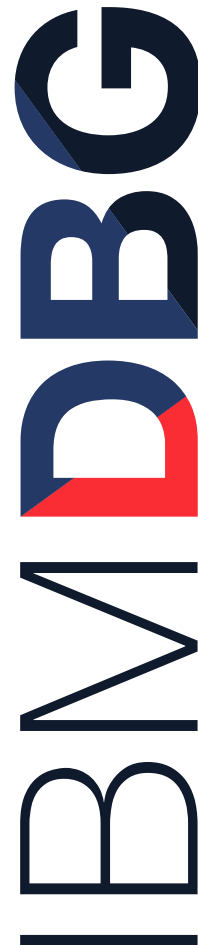
IBM Performance and Programmatic Marketing

Analytics & Data

# IBM Analytics & Data

Overview & Case Study

March 16, 2017



**IBM Performance and Programmatic Marketing**

Analytics & Data

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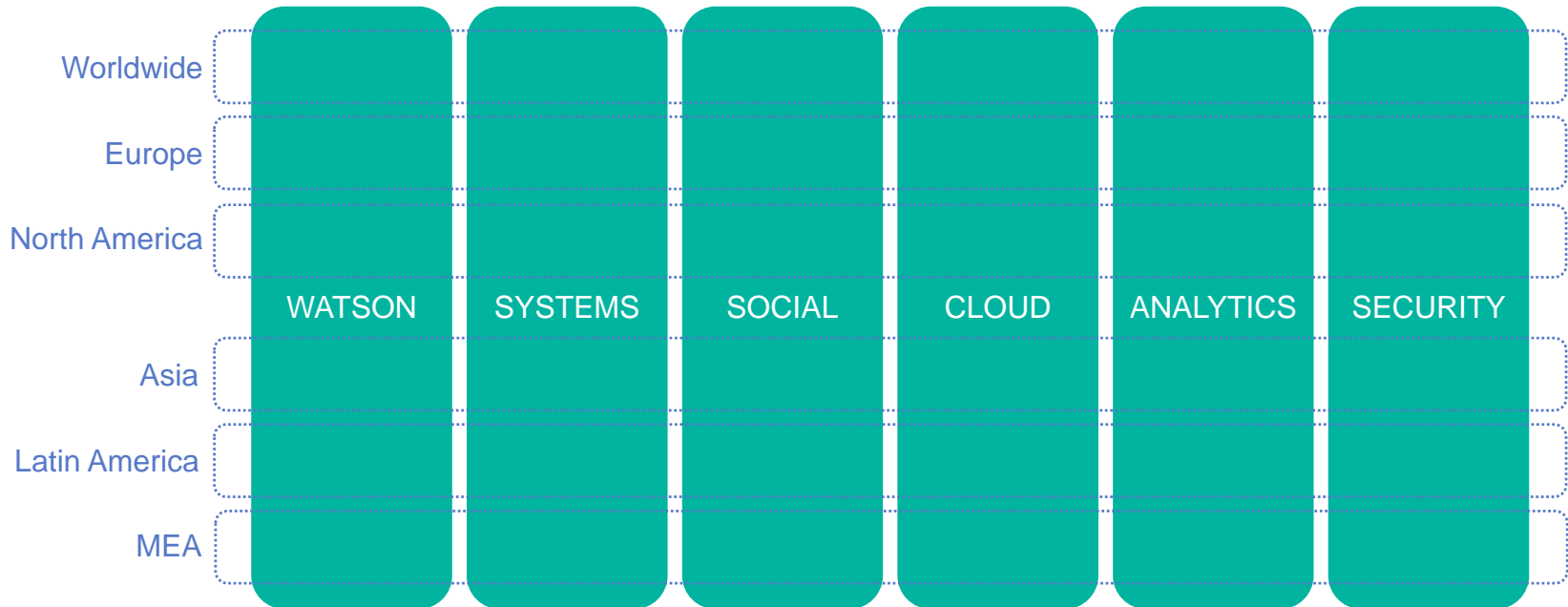
# Analytics & Data Overview

## What is the Digital Business Group (DBG)?

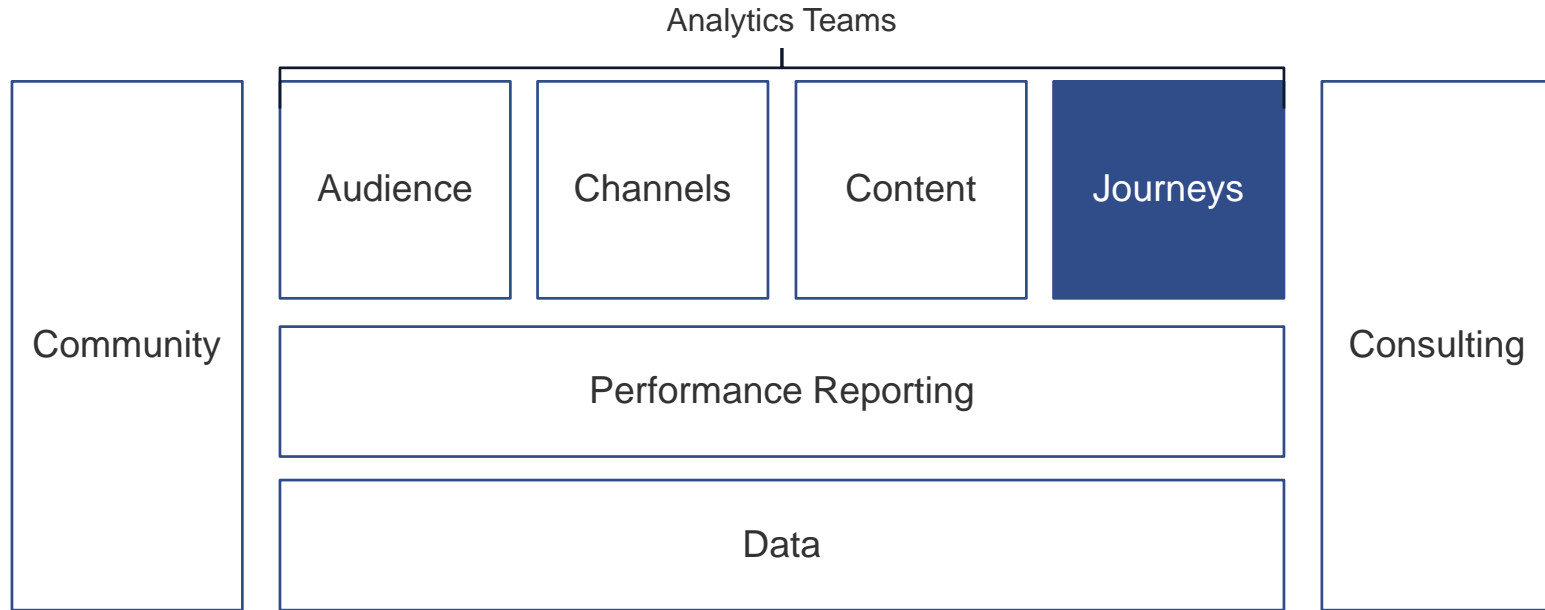
- The Digital Business Group is tasked with making the shift from a sales force-driven organization to a digital organization – both in our marketing and in our products
- With this shift comes the necessity to focus on new types of interactions that exist throughout the buyer journey, rather than just at point-of-sale
- It also increases the ability (and necessity) to use data and analytics in everyday decision-making – this is our focus today

## CHQ's role in the Digital Business Group

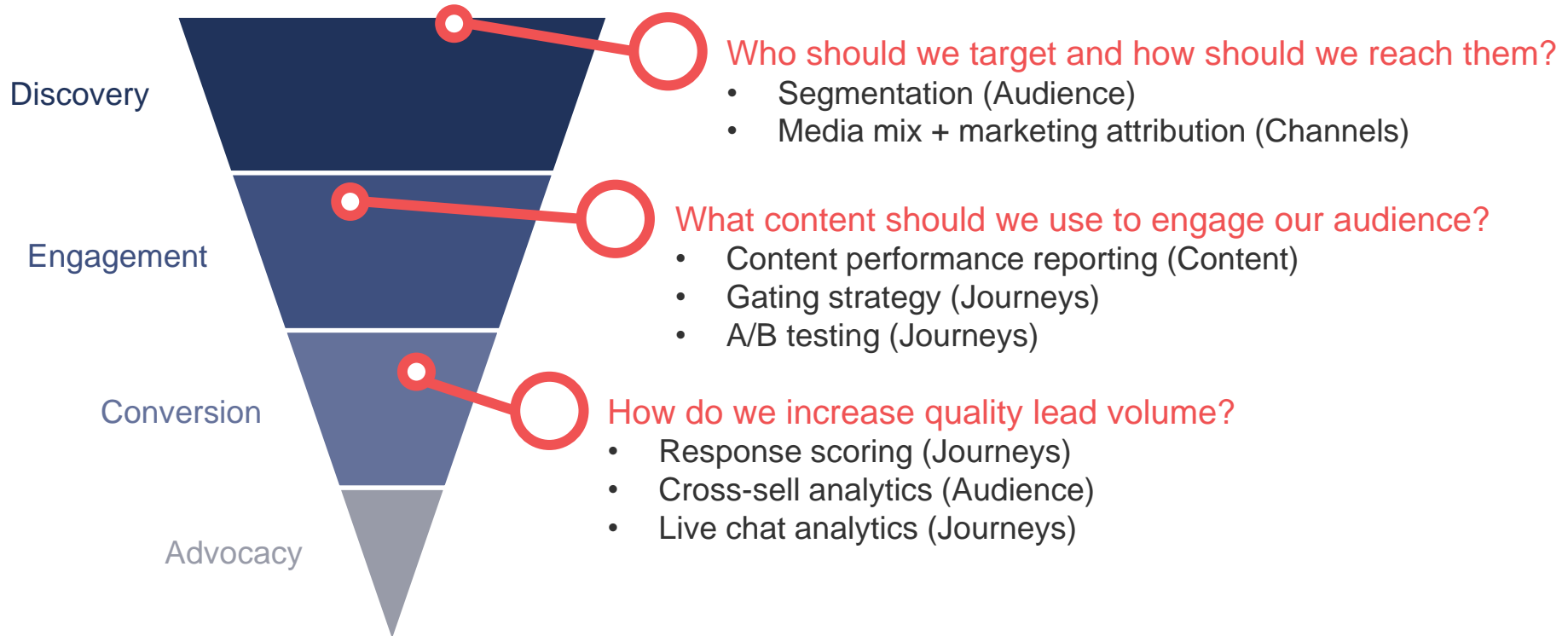
**CHQ** Subject-matter experts in a variety of areas, one being **Analytics & Data**



## How Analytics & Data (A&D) supports marketing



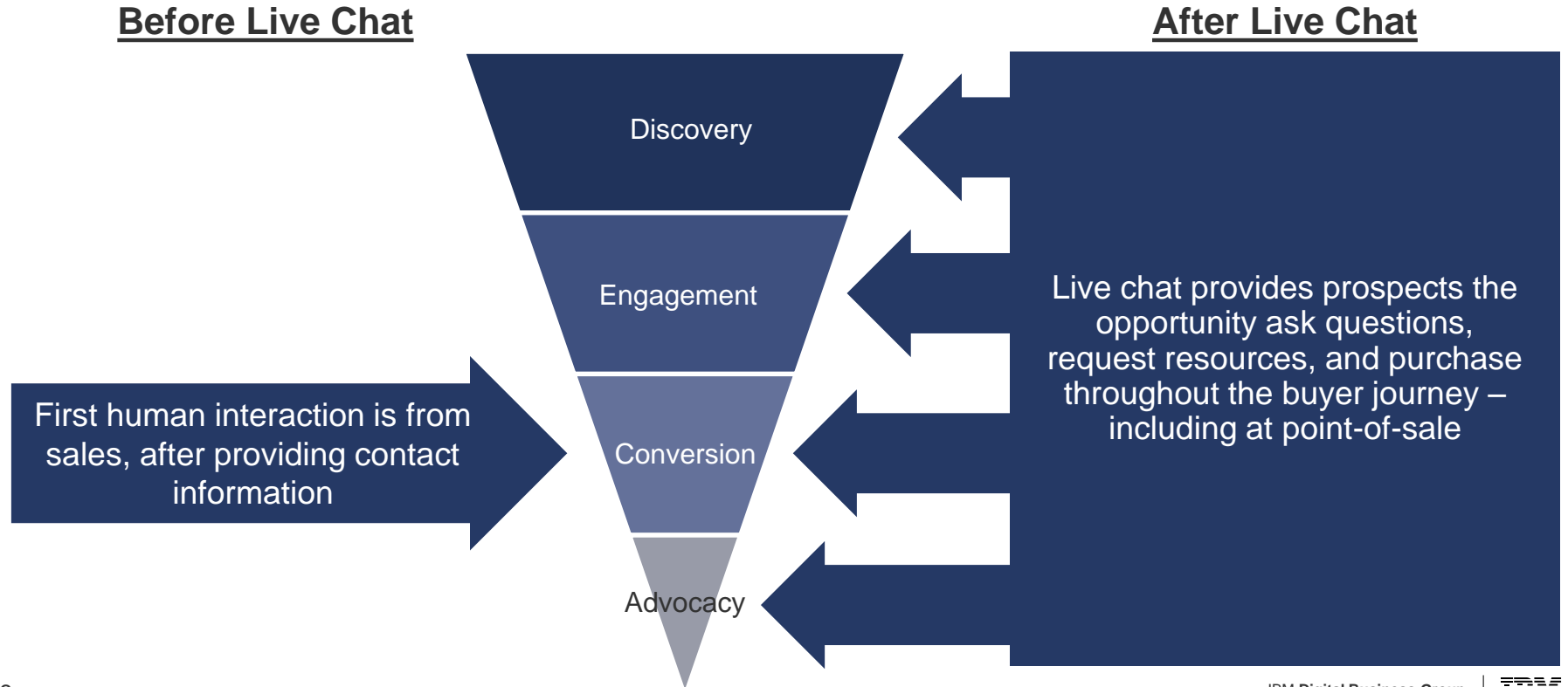
## Sample A&D projects



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# Case Study: Optimizing Live Chat Conversion

## Why is live chat important to the DBG strategy?





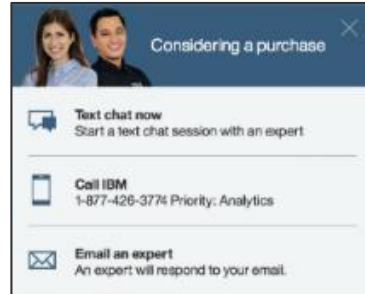
# How does live chat work?

## Visitor arrives on web page



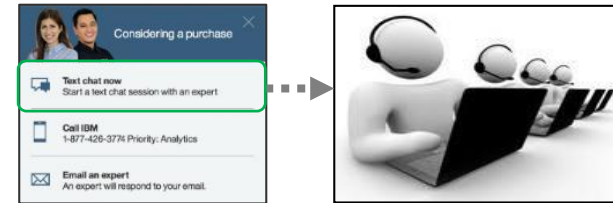
Client or prospect navigates to web page, which may or may not have chat installed

## Visitor is prompted to chat



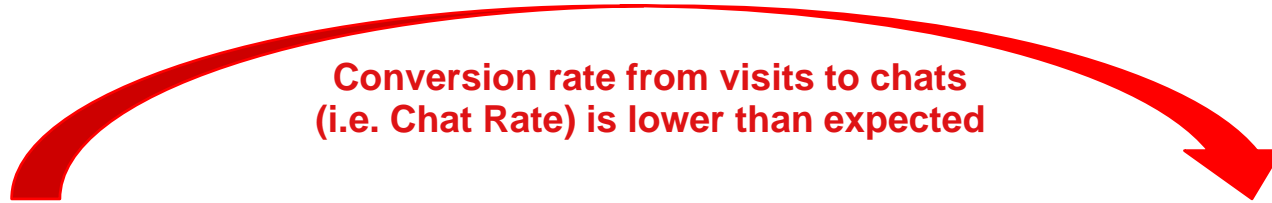
If the page has chat installed AND an agent is available, the “Chat Now” option appears in the contact module and a proactive chat pop-up may appear

## Visitor clicks on chat and a chat is routed to an agent



The user is then routed to an agent so a chat can begin

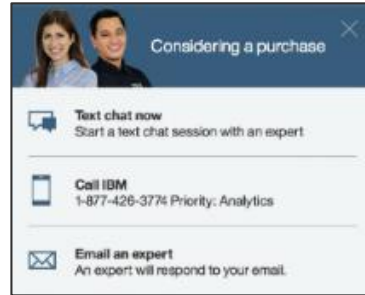
# The Problem: Visitors aren't chatting at expected rates



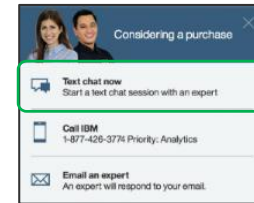
**Visitor arrives on web page**



**Visitor is prompted to chat**



**Visitor clicks on chat and a chat is routed to an agent**



## So what do we do?

**Step 1:** Identify the largest drivers of the KPI (Chat Rate)

**Step 2:** Determine how to measure each of the drivers

**Step 3:** Leverage data to optimize each problem area

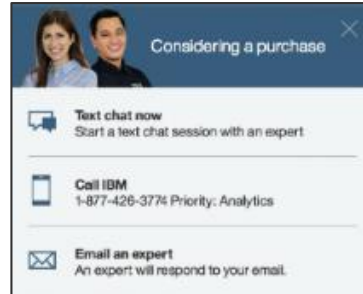
# Step 1: Identify the largest drivers of the KPI (Chat Rate)

Visitor arrives on web page



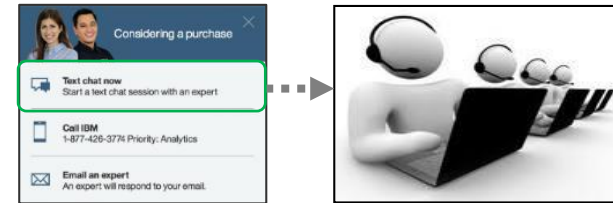
1) Does the page have live chat installed?

Visitor is prompted to chat



2) Is chat available at the time of the visit?

Visitor clicks on chat and a chat is routed to an agent



3) Are visitors clicking on chat when it's available?

## Step 2: Determine how to measure each of the drivers

### Visitor arrives on web page

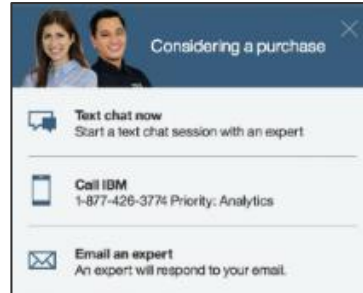


1) Does the page have live chat installed?

**KPI:**

% of visits to pages w/ chat installed

### Visitor is prompted to chat

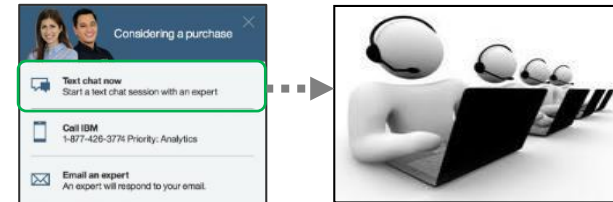


2) Is chat available at the time of the visit?

**KPI:**

% of visits to pages w/ chat installed when chat was available

### Visitor clicks on chat and a chat is routed to an agent

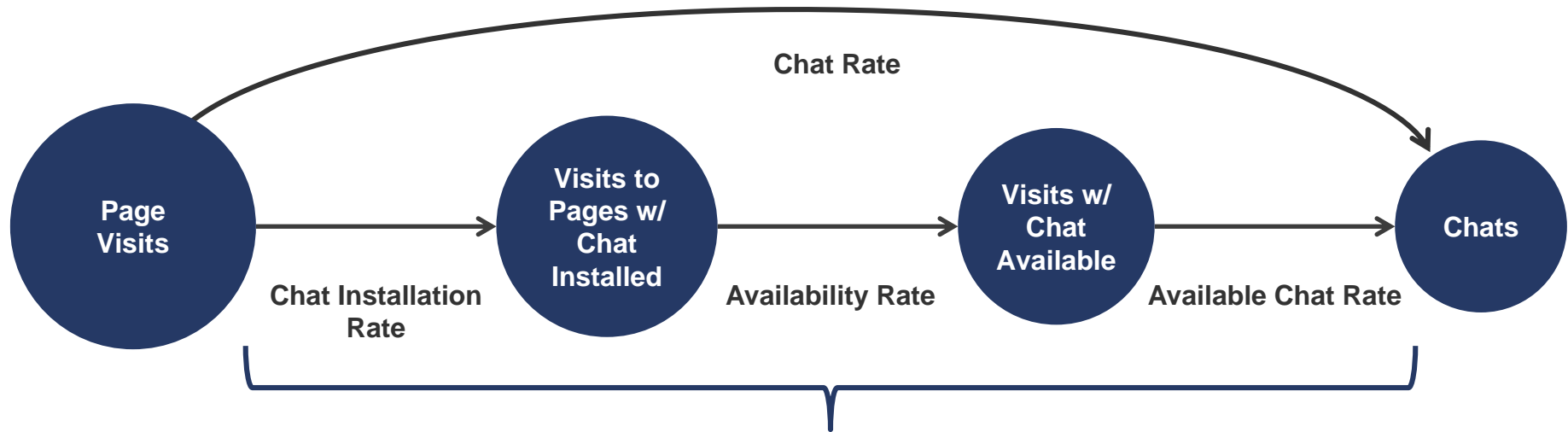


3) Are visitors clicking on chat when it's available?

**KPI:**

% of visits engaging with chat when chat was available

## The framework we used to understand and quantify the issue



These new KPIs enable us to diagnose how each of the potential problem areas contribute to overall low chat rates

## Step 3: Leverage data to optimize each problem area

**Data:** Identify the data sources necessary to enable the KPIs

**Analytics:** Identify how the data needs to be manipulated and analyzed in order to gain insight

**Reporting:** Provide visual representations and access to the data and analytics

**Testing:** Create a test/control environment in order to identify the impact of particular changes

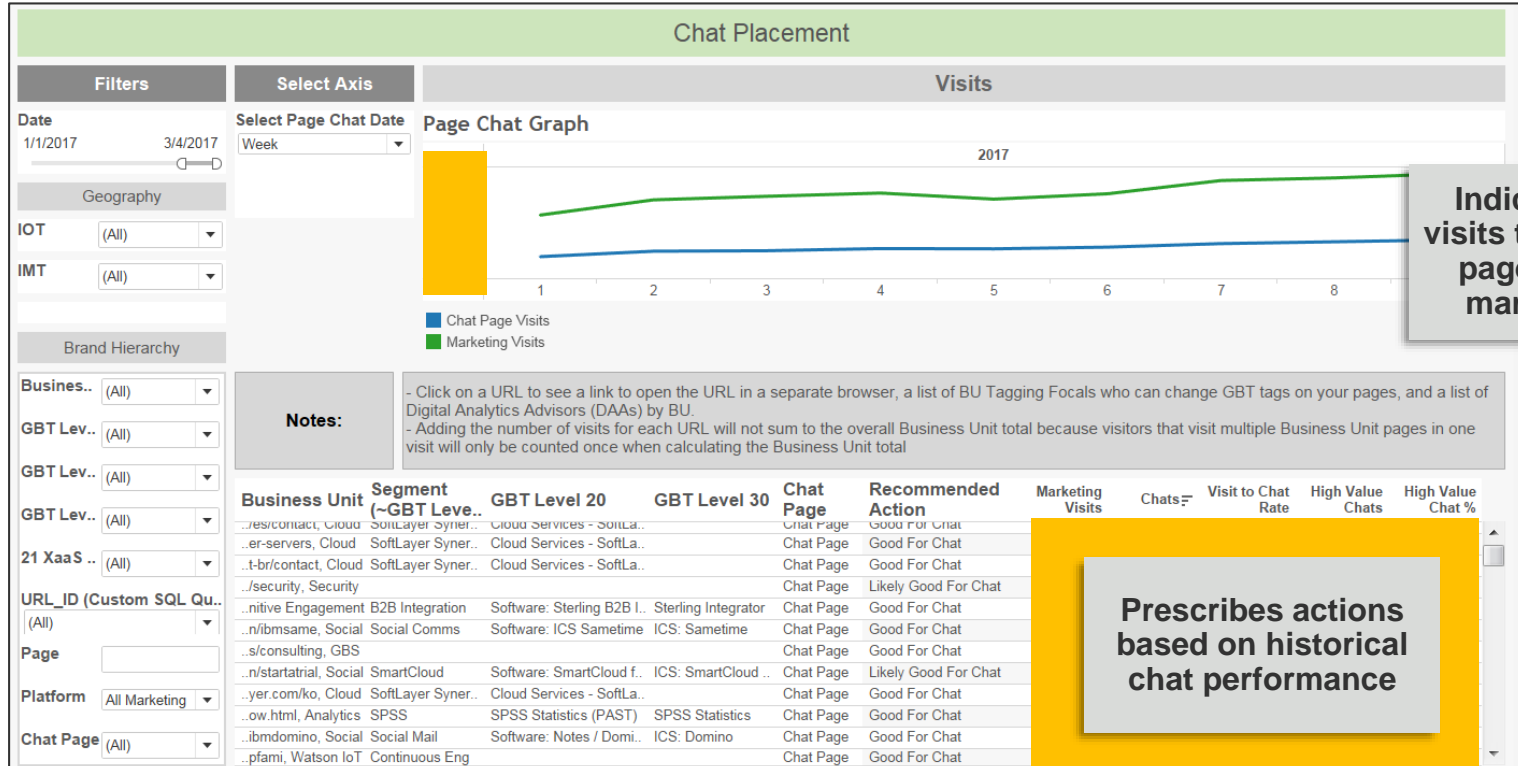
### Step 3: Leverage data to optimize each problem area



<b>Analytics</b>	Analytics model which uses historical chat data to provide recommendations on chat placement	Analytics model which predicts expected chat volume to help Digital Sales determine staffing levels*	
<b>Reporting</b>	Reporting on top visited pages, whether the pages have chat, and the recommendation	Reporting on performance by hour of day + staffing recommendations based on analytics model*	Reporting on chat engagement by page and business unit*
<b>Testing</b>			A/B testing chat module design, copy, imagery, and personalization based on user activity



# Chat Placement deep-dive

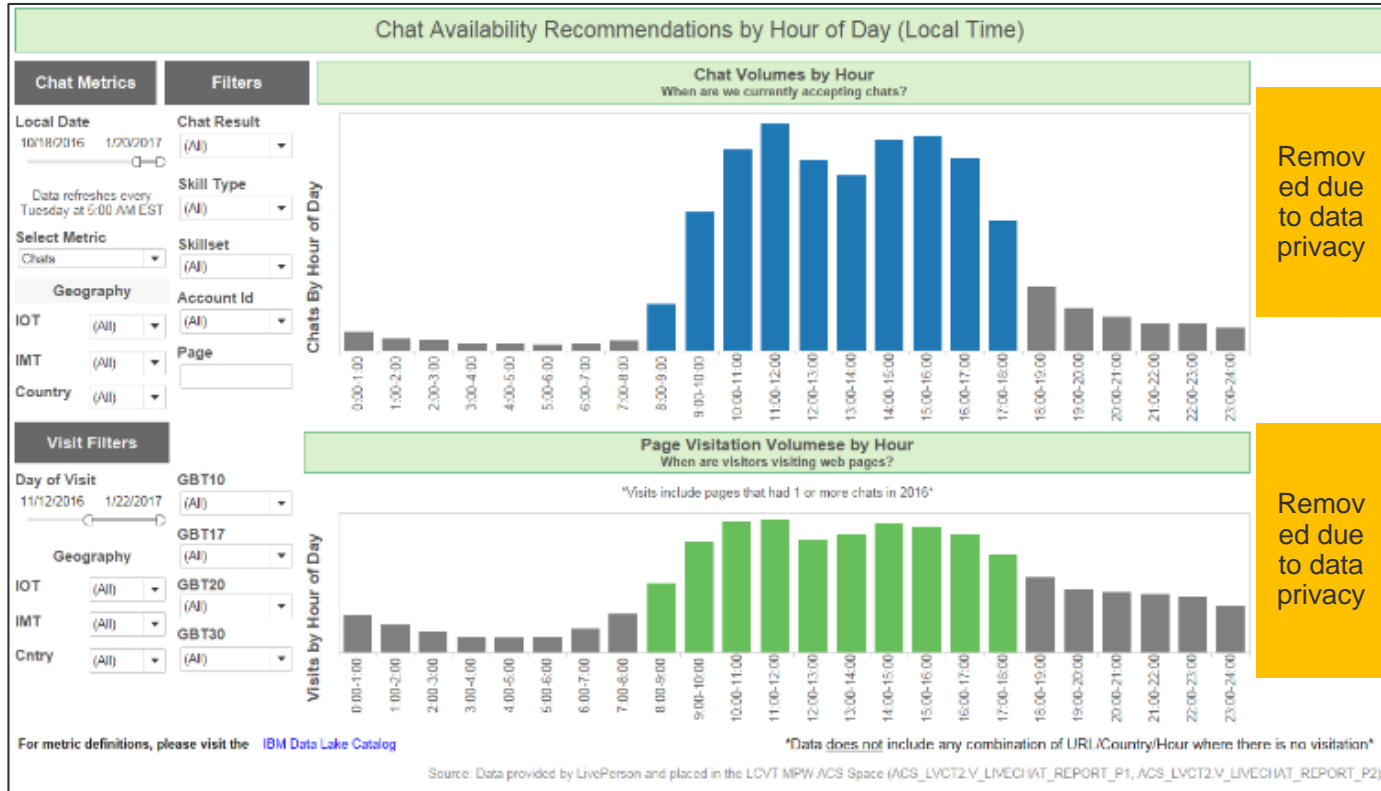


Indicates trend in visits to chat-enabled pages vs. overall marketing visits

Prescribes actions based on historical chat performance

Removed due to data privacy

# Chat Availability deep-dive



Removed due to data privacy

Shows during what hours of day chats are accepted by reps (dependent upon availability)

Removed due to data privacy

Shows during what hours of day visitors navigate to pages for each page, product, and geo


## Chat Testing deep-dive

**Hypothesis:** Changing the contact module call to action based on what we know about the visitor will result in higher engagement


### “Discovery” Visitors

How can we help you? ✕


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 **Text chat now**  
Start a text chat session with an expert


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 **Call IBM**  
1-800-543-2185 Priority Code: SPSS

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 **Email an expert**  
An expert will respond to your email.


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 **Schedule a consultation**  
Pick a time to meet with an advisor


### “Engagement” Visitors

Have questions about this product? ✕


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 **Text chat now**  
Start a text chat session with an expert


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 **Call IBM**  
1-800-543-2185 Priority Code: SPSS

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 **Email an expert**  
An expert will respond to your email.


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 **Schedule a consultation**  
Pick a time to meet with an advisor


### “Conversion” Visitors

Considering a purchase? ✕


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 **Text chat now**  
Start a text chat session with an expert


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 **Call IBM**  
1-800-543-2185 Priority Code: SPSS

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 **Email an expert**  
An expert will respond to your email.

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