

## IBM | Diamond Winner

Strengthening Marketing's Role in Customer Experience and Success

# ExpertAdvice Program

## BUSINESS CHALLENGE

Prior to the implementation of this program, clients and prospective clients had very few, if any, opportunities to speak with IBM subject matter experts. Prospective clients and most existing clients had to first go through several digital interactions with IBM, including sending emails and using live chat on webpages to speak to a generalist Digital Development Representative (DDR). These representatives were spread thin with their various inbound and outbound marketing responsibilities, and have general knowledge of IBM products and services rather than specialized subject matter expertise. DDRs primarily interacted with prospects through a live chat tool, which yielded a conversion rate to sales opportunity of only 8%. All in all, the legacy process required prospects to overcome many layers of obstacles before speaking with someone, typically a seller, who could address their needs.

## PROGRAM OBJECTIVES

The ExpertAdvice program was implemented to eliminate layers by providing a free service to prospects where they could directly be connected with an IBM expert to discuss their business problem and technology needs. The program aimed to:

- Provide value to the prospect, whether or not they pursue a sales opportunity with IBM
- Bring IBM expertise to the forefront of the digital experience
- Introduce a human element in digital interaction
- Generate new business pipeline

## EXECUTION

Over the past year and a half, IBM marketing conceived, piloted, and scaled ExpertAdvice—a first of a kind program that enables clients and prospects that digitally interact with IBM web pages to participate in a free, 30 minute consultation with an IBM subject matter expert (SME) on the topic of their choice. The customer journey is straightforward; a prospect exploring the IBM website in search for answers to an issue, can schedule a consultation through an interface that allows them to directly schedule time on calendars of distinguished IBMers, and describe the business problem they wish to discuss.

Behind this simple yet effective user experience is an elegantly designed support system, including:

- Tools integrated with IBM systems to provide a seamless user experience
- A team of digital representatives that ensure the requests are valid and would benefit from the consult
- A cohort of IBM experts that agree to dedicate up to two hours of their time per week to speaking with prospects
- A marketing team dedicated to discovering new ways to interact in an agile manner, and driving traffic to prompt engagement with the program

The program started as a pilot in April 2017 in the Global Technology Services unit and was scaled across IBM through 2018. Optimization has included working with sales leadership to empower and enable the sales teams to address the new volume of white space leads, as well as integration to marketing automation systems to ensure nurturing and progression of opportunities.

## BUSINESS RESULTS

ExpertAdvice was generated first and foremost to improve the customer experience by shortening the lead time to access IBM expertise at a peer level, and in turn, to organically convert leads into opportunities. As such, the success of ExpertAdvice is assessed across three key metrics:

### 1. Customer Experience

Engagement through the ExpertAdvice program generates a much higher percentage of high value interaction than other channels, with ~65% of inquiries progressing to consultations. Those that engage in the consultation have positive feedback, most of the surveys indicating clients had “Great” and “Exceptional” experiences, and that they were “Extremely likely” to recommend the program.

### 2. Pipeline Conversion

ExpertAdvice saw high conversion rates from consultation to opportunities in pipeline, with ~30-40% conversion rates, compared to other channels such as live chat that have 8% conversion. 40% of these opportunities came from white space clients, demonstrating the value of expertise for new IBM prospects, as noted by one of our experts: *“This programme has been very well managed and has led to direct contact with 3 or 4 clients IBM would not have engaged with otherwise.....”* - Steven Dickens, zCloud Expert, GTS

### 3. Opportunity Generation

For Global Technology Services, the longest standing pilot, over \$29 million in pipeline has been generated through the program. As the sales cycle on these opportunities progress through close partnership with sales and the program expands across geographies, revenue and profit will logically follow.