The Toll-Free Maturity Model

Summary

Toll-Free Numbers have been a staple of business communication for nearly 50 years. What started as a way to alleviate long distance fees for consumers has long transformed into a multi-purpose communication tool that drives the customer journey from marketing to sales to support. It's the number we call – and now text – when we want to order flowers, pose a complex sales question, report a broken appliance, trouble shoot a computer issue, process a financial transaction and facilitate hundreds of other interactions that demand a personal touch.

Today, a single business may deploy thousands of Toll-Free Numbers to support Click-to-Call ads and track highly segmented multi-channel marketing campaigns. Millions of Toll-Free calls are routinely analyzed by intelligence software to glean critical consumer insights. And Toll-Free Numbers present a strong opportunity to integrate online and offline channels as part of the customer's journey and connect offline channels to digital CRM databases.

It's clear the use of Toll-Free Numbers has advanced beyond its traditional value. And a wide range of parties – from end users to marketing technology innovators to call center solutions providers – are packaging Toll-Free Numbers into new applications.

So Somos engaged an independent research firm to conduct in an in-depth study of six major companies to better understand how they're leveraging Toll-Free Numbers on a day-to-day and campaign-by-campaign basis. The companies spanned the retail, automotive, insurance, manufacturing, entertainment and hospitality industries. The interviews were conducted with senior decision makers with responsibility for and experience managing Toll-Free Number usage.

Here is a summary of the results.

Key Findings:
Basic and Advanced Users

All interviewees leveraged Toll-Free Numbers for inbound call center purposes. This is deemed the most fundamental Toll-Free Number use case and represents the incumbent position as the primary link between a business and its customers.

Enterprise users fall into two groups based on usage: basic and advanced.

- Basic users rely on Toll-Free Numbers for call center dial-in support based on ease of use and administration, assumed credibility and memorability of vanity numbers

- Advanced users see the clear value of Toll-Free Numbers to support complex advertising and campaign tracking, and as a communications vehicle that can seamlessly support the customer journey. Advanced users rely on Toll-Free Numbers to:

  - Integrate offline (e.g., newspaper, radio, TV) channels to digital (e.g., eCommerce, email marketing) channel

  - Connect offline channels to digital CRM databases

  - Test the effectiveness of various online and offline channels to improve marketing ROI

  - Track the customer across its journey from inquiry to buy to support

  - Industries with shorter acquisition cycles (e.g., B2C goods retail, direct response marketing, etc.) use Toll-Free Numbers for more advanced purposes than other verticals, such as manufacturing

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Marketers see an increasing shift of marketing dollars to online channels: email, SEO, SEM, etc., to mirror customer behaviors.

Key Findings:
Advanced Applications
Deepen Customer Intelligence

The introduction of mobile click-to-call (or text) using Toll-Free Numbers is a positive direction. Most interviewees leveraged this use case as part of their broader marketing campaigns, with different numbers for different emails, apps, and banner ads, and Toll-Free Numbers integrated into enterprise CRM systems.

Toll-Free Numbers form a vital component of the customer service process and newer technologies, messaging apps, VCAs, and journey analytics, can leverage Toll-Free Numbers to generate customer insights.
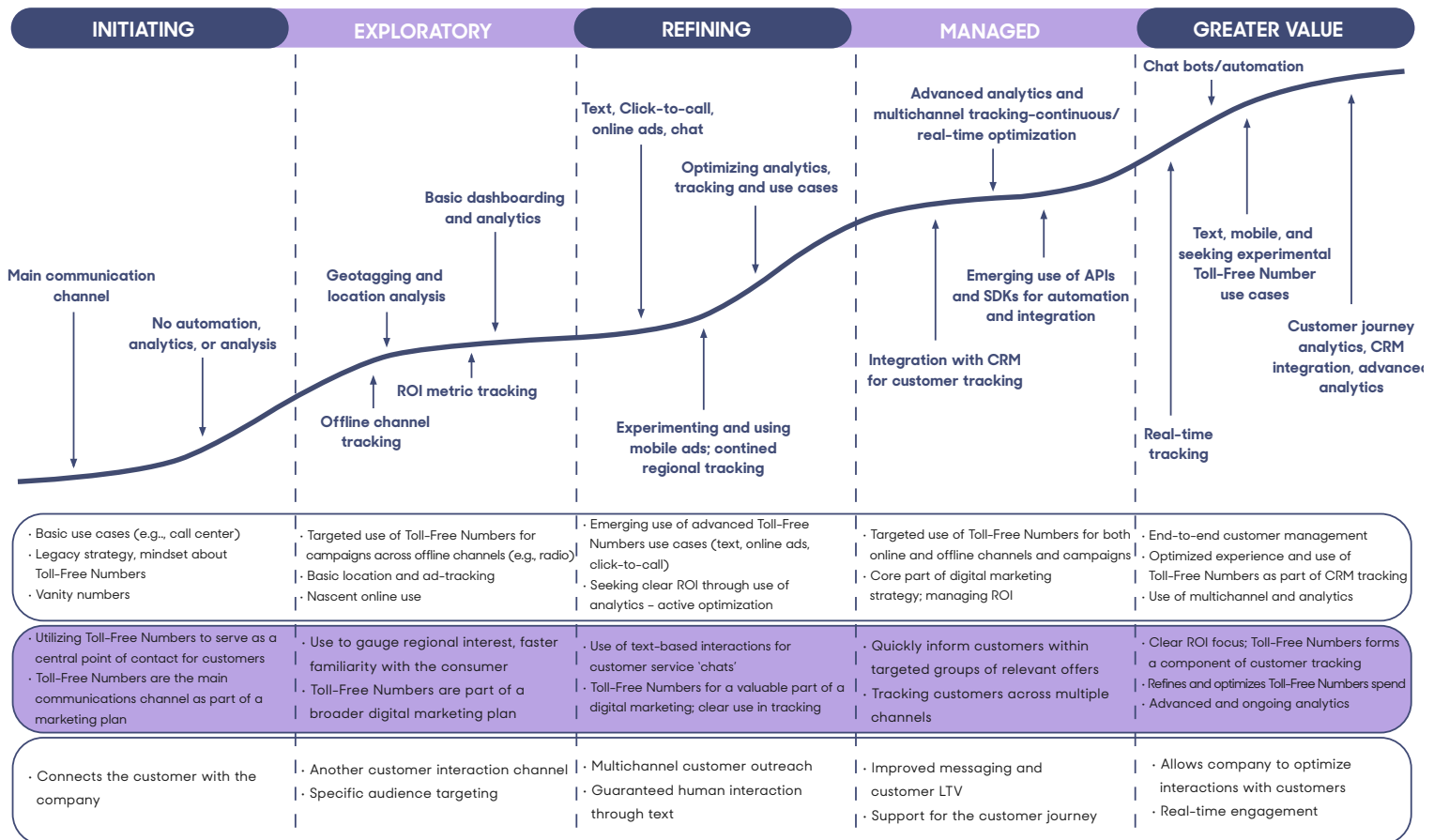
Text-enabled Toll-Free Number use was nascent, though apparent value was recognized as a potential Toll-Free Number application. Gartner predicts by 2019, requests for customer support through consumer messaging apps will exceed those for support through traditional social media, which will drive the relevance of text-enabled Toll-Free Numbers.

The Toll-Free Number
Maturity Model

Enterprises are increasingly focused on the customer journey to drive retention and upsell, and the use of Toll-Free Numbers (and other marketing tools) varies depending on organization maturity. The Toll-Free Number Maturity Model shows how companies build on the inherent qualities of Toll-Free Numbers for branding and credibility to connect offline and online channels and enable customers analytics and CRM integration.

At each phase of the model, Toll-Free Numbers deliver higher Return on Investment and serve to unify a wide range of customer and marketing interactions and insights. There is a deficiency in tools to tie offline and online channels together with enterprise CRM. This is critical for the end-to-end journey, and Toll-Free Numbers can play a unique role here because they are used across the entire customer lifecycle.

The Toll-Free Number Maturity Model provides a framework to segment enterprise users and target based on needs to progress upward to higher value enterprise use cases.

INITIATING	EXPLORATORY	REFINING	MANAGED	GREATER VALUE

Curve labels (left to right):
- Main communication channel
- No automation, analytics, or analysis
- Geotagging and location analysis
- Offline channel tracking
- ROI metric tracking
- Basic dashboarding and analytics
- Text, Click-to-call, online ads, chat
- Optimizing analytics, tracking and use cases
- Experimenting and using mobile ads; contined regional tracking
- Advanced analytics and multichannel tracking–continuous/ real-time optimization
- Emerging use of APIs and SDKs for automation and integration
- Integration with CRM for customer tracking
- Chat bots/automation
- Text, mobile, and seeking experimental Toll-Free Number use cases
- Customer journey analytics, CRM integration, advanced analytics
- Real-time tracking

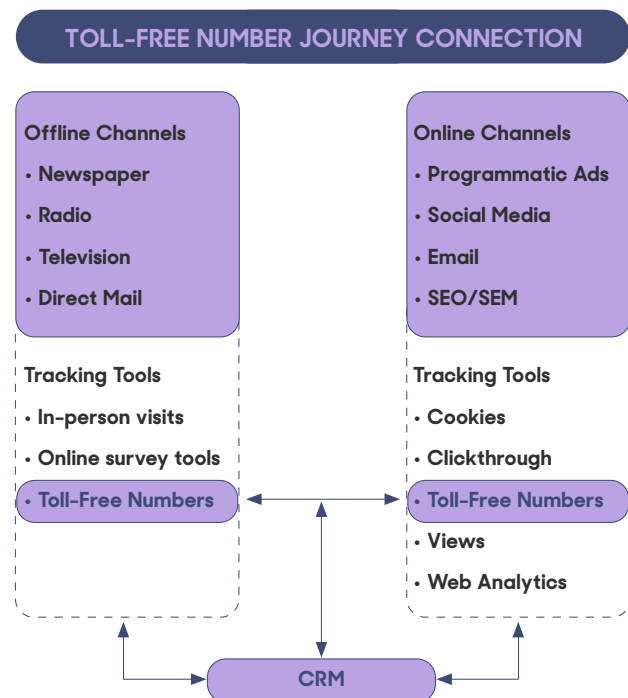| INITIATING	EXPLORATORY	REFINING	MANAGED	GREATER VALUE
· Basic use cases (e.g., call center) · Legacy strategy, mindset about Toll-Free Numbers · Vanity numbers	· Targeted use of Toll-Free Numbers for campaigns across offline channels (e.g., radio) · Basic location and ad-tracking · Nascent online use	· Emerging use of advanced Toll-Free Numbers use cases (text, online ads, click-to-call) · Seeking clear ROI through use of analytics – active optimization	· Targeted use of Toll-Free Numbers for both online and offline channels and campaigns · Core part of digital marketing strategy; managing ROI	· End-to-end customer management · Optimized experience and use of Toll-Free Numbers as part of CRM tracking · Use of multichannel and analytics
· Utilizing Toll-Free Numbers to serve as a central point of contact for customers · Toll-Free Numbers are the main communications channel as part of a marketing plan	· Use to gauge regional interest, faster familiarity with the consumer · Toll-Free Numbers are part of a broader digital marketing plan	· Use of text-based interactions for customer service 'chats' · Toll-Free Numbers for a valuable part of a digital marketing; clear use in tracking	· Quickly inform customers within targeted groups of relevant offers · Tracking customers across multiple channels	· Clear ROI focus; Toll-Free Numbers forms a component of customer tracking · Refines and optimizes Toll-Free Numbers spend · Advanced and ongoing analytics
· Connects the customer with the company	· Another customer interaction channel · Specific audience targeting	· Multichannel customer outreach · Guaranteed human interaction through text	· Improved messaging and customer LTV · Support for the customer journey	· Allows company to optimize interactions with customers · Real-time engagement

Toll-Free communications can form a strong link across the customer experience journey and interaction value chain.

For customer experience to thrive, a deep and collaborative relationship between customer experience and marketing channel leaders is needed. Problems with a brand's customer experience can lead to higher churn, diminished reputation, and reduced willingness to recommend. Customers expect a unified brand experience, but functional silos and competing goals (even within the marketing department itself) hinder many brands' abilities to improve customer experience.

Enterprise conversations indicated that there was a deficiency in tools that could tie together offline channels to online channels and an enterprise's CRM system. For example, radio, television, and newspaper ads often end with a call to action, which is a Toll-Free Number, and not an email address or website. The ability to leverage analytics to link together a consumer's journey from inquiry, to buy, and all the way to advocate can be a differentiator for B2C and B2B organizations. By shifting users upward on the maturity model, service providers can demonstrate Toll-Free Numbers' resilient value and ongoing need, beyond basic (e.g., traditional call center) use cases, such as tracking across the customer journey, a critical activity for many B2C organizations.

Toll-Free Numbers connect offline and online channels to the customer

TOLL-FREE NUMBER JOURNEY CONNECTION

Offline Channels
- Newspaper
- Radio
- Television
- Direct Mail

Tracking Tools
- In-person visits
- Online survey tools
- Toll-Free Numbers

Online Channels
- Programmatic Ads
- Social Media
- Email
- SEO/SEM

Tracking Tools
- Cookies
- Clickthrough
- Toll-Free Numbers
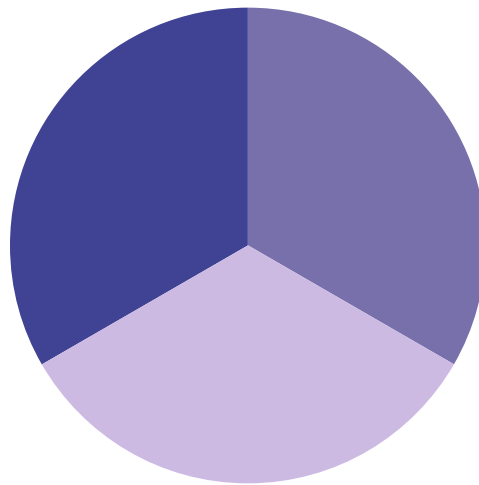- Views
- Web Analytics

CRM

Consumer facing verticals are generally more mature in their use of Toll-Free numbers for tracking and measuring ad campaigns to acquire new customers.

Different organizations in each vertical will be at varying levels of maturity. In general, verticals with shorter sales cycles and those with B2C sales models are more likely to be advanced users of Toll-Free Numbers for ad tracking and measurement. These organizations leverage Toll-Free Numbers for building insights about customers and prospects as they move through various digital channels.

Resp Orgs should segment end-user market across three measures:

Business-to-consumer focus: retail, banking, communications/ media, insurance – highlight flexibility, ease of use, and campaign tracking

Shorter customer acquisition cycles – focus on usability for direct response campaigns (analytics, tracking), low cost, and flexible use

Higher use verticals: retail, banking, insurance – extend current use by highlighting industry best practices and reference cases

Vertical Alignment to Toll-Free Number Enterprise Use Cases Maturity Model

VERTICAL	OBSERVATIONS	OPPORTUNITIES
Banking/Financial Services*	• Use of Toll-Free Numbers for customer support, inapp (e.g., mobile wallet) click-to-call support • Retail banking is progressive – hypercompetitive segment with online options for consumers • Ad tracking for mobile offers	• Demonstrate continued innovation with use of customer support chat bots using text-enabled Toll-Free Numbers • Multichannel marketing campaign effectiveness • Customer journey tracking/analytics
Communications/Media/ Entertainment*	• One-time offers through text messages and traditional customer support • Special deals through radio/TV advertisements – Toll-Free Numbers provide tracking	• Use of different Toll-Free Numbers to measure direct response marketing campaigns • Near real-time changes of numbers for A/B testing
Retail*	• Customer engagement, special offers, and multichannel marketing measurement • Use of mobile click-to-call	• Leverage text– Toll-Free Numbers for proposing offers based on geolocation • Customer tracking between off-and online channels
Insurance*	• Traditional customer support • Use of Toll-Free Numbers for offline (TV, radio) ad tracking and measurement	• Demonstrate usefulness to increase value by more progressive use for tracking and ROI measurement • Chat bot/text– Toll-Free Numbers for customer support
Manufacturing	• Traditional customer support	• Improve supplier/customer engagement by implementation text– Toll-Free Numbers
Utilities	• Traditional customer support	• Leverage text– Toll-Free Numbers for customer support, usage metrics (e.g., time of day or outage alerts)
Transportation	• Traditional customer support	• Text-enabled chat bots for geolocation and delivery timing • Integration with customer service
Wholesale Trade	• Traditional customer support	• Text-enabled supplier and pricing alerts
Education	• Traditional customer support	• Use of online channels for digital/click-to-call support and learning resources
Healthcare	• Traditional customer support	• Text-enabled scheduling and reminders
Government	• Traditional customer support	• Mobile click-to-call for support and customer engagement • Text-messaging for services

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