Field Services Company Enjoys a Customer Experience "LIFT" with Bridgetree & Redpoint

Introduction

In a WorkWave State of Pest Control Technology survey report, 67 percent of respondents indicated that delivering best-in-class customer experience was their company's top business goal, behind only "increasing revenue" (79 percent) as the No. 1 focus.

Projected to generate $17 billion in revenue by 2023, the US pest control industry comprises roughly 27,000 businesses providing residential and commercial services. As a field service business entrusted with safeguarding the home, pest control companies are especially sensitive to providing a superior customer experience; with stiff competition, retention and acquisition often cited by industry insiders as key challenges.

One fast-growing pest control business that provides environmentally friendly solutions and services to hundreds of thousands of customers in most major US markets viewed a best-in-class customer experience as a competitive differentiator. To deliver on this vision, the company sought out a technology, data and services partner to upgrade its marketing technology stack, and eliminate data siloes and inefficiencies that limited its ability to develop a deep understanding of its customers and prospects.

This customer story will explore the company's partnership with Bridgetree, which uses the Redpoint CDP as the marketing technology platform underlying its LIFT marketing services and software package solution. With Redpoint ingesting customer data from 10-15 sources to provide a single customer view, and an open garden architecture for seamless integration with multiple third-party applications, the database-agnostic platform provides the field services company with a single point of control over data, decisions and interactions as well as a central hub for campaign orchestration and customer preferences.

The Journey to a Better CX Begins

To acquire higher value customers, boost retention and achieve sustainable, long-term growth, the field services company contracted with Bridgetree to help optimize its use of data and interactions. Initial objectives were two-fold: the company sought to leverage Bridgetree's marketing services and national database to grow its prospect list, and to leverage its solution consulting experts to identify opportunities for consolidating multiple data sources, particularly to increase efficiency in call center and service request operations, and to close more leads.

To help boost customer acquisition and retention efforts, Bridgetree created a prospect list of 50+ million marketing qualified leads (MQLs) from its national database through proprietary scoring and look-alike model analysis. To more effectively target

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these prospects, however, the field services company needed to know who they were —the specific problem they might be facing, whether they were lapsed customers, new movers, warm leads or completely cold prospects; homing in on the variables would enable the company to personalize interactions.

What stood in the way of achieving this objective, however, was having customer data siloed in disparate systems; a hosted CRM solution, the call center, multiple email service providers, lead management tool and multiple branch offices all held and managed contact and customer data through multiple systems (billing, invoicing, scheduling, service, etc.).

Bridgetree recognized that for its client to learn more about the characteristics of an ideal prospect, it would be necessary to know more about both active and inactive customers, extrapolating data about known customers using modeling to deliver insights on the prospect list.

"This is how the LIFT and Redpoint journey started," said Sanjay Mamani, Bridgetree Vice President for Strategic Technology Development. "The company has active customers, inactive customers, prospects; and by consolidating all customer data into a single view, it would be possible to re-target inactive accounts, improve servicing for existing customers, and have sales teams target prospects more likely to be profitable long-term customers."

Redpoint Golden Record

The Redpoint CDP is the core component of the LIFT packaged solution. Consolidating customer data from the 10-15 disparate sources, the customer experience platform integrates with several third-party applications to provide sales, marketing and service with a unified customer profile and a single point of control that ensures a consistent and personalized customer experience across multiple channels.

With Redpoint, Bridgetree built the Redpoint Golden Record, a comprehensive 360˚ customer view that consolidates structured, semi-structured and unstructured customer data from every source. This persistently updated, single customer view enhances the customer experience by providing call center agents with on-demand, instantly accessible customer data from every source for an updated, real-time view of all customer behaviors, preferences and transactions. Further, it provides sales teams with key insights for closing new leads from the millions of scored prospect records. Service also utilizes the Redpoint Golden Record to improve scheduling efficiencies and increase customer satisfaction.

The single customer view derived from the Redpoint Golden Record includes advanced identity resolution capabilities that add an important layer of context to a customer record. Every customer identifier—emails, addresses, devices, social, phone numbers —combines with behavioral and transactional data to build a contextual customer relationship, which helps ensure that every customer interaction is optimized in the context of a unique customer journey.

The Redpoint Golden record is accessible to call center agents, sales teams, service teams, and operational marketers. The field service company utilizes the unified customer view powered by the Redpoint CDP in several ways:

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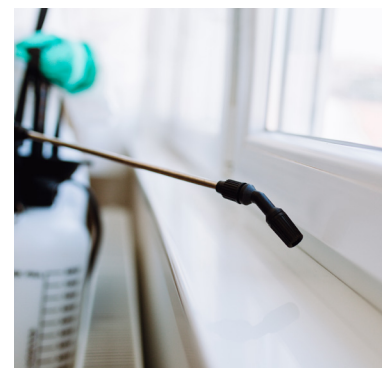
- **Call center agents** – An instantly accessible customer record of the caller and the likely reason for the call provides agents with a contextual understanding, enabling them to deliver relevance to the interaction, enhancing the customer experience and increasing overall satisfaction.
- **Sales teams** - Integration of the prospect list with active customers enables the targeting of prospects who are more likely to be profitable through look-alike modeling.
- **Service** – By making using the customer's preferences and available appointment data, the LIFT system can now suggest only available appointments that meet the customers preferences, reducing handle time and increasing customer satisfaction.
- **A New Mobile Service App** – Bridgetree built a service mobile app to enable call center agent and service field reps to live chat while in the field, allowing agents to address customer questions and resolve service concerns in real-time.

Open Garden Architecture

Redpoint's open garden architecture was a key factor in expanding the LIFT use case via the Redpoint CDP as the centerpiece of the company's marketing technology stack.

An open garden approach affords flexibility, control and efficiency for customers by not locking them into a pre-set data model and allowing them to maintain and optimize solutions they already have in place or to add new solutions without having to rip and replace their existing infrastructure.

A Twilio Flex integration with the Redpoint CDP exemplified the field company's need for an open garden approach, ending up as a core component of the company's LIFT project with Bridgetree. Customer data of every type and from every source—call center, branch offices, sales, etc.—was made available in a high-performance relational database for Twilio Flex, automatically pulling up customers for any inbound or outbound interaction—a call, email, SMS or webchat.

"Redpoint's open garden architecture was extremely important for building out this use case," Mamani said. "We've successfully integrated third-party systems including Twilio Flex, the company's inside sales team, lead generation efforts, door-to-door sales application and a proprietary sales planning tool, which was all possible due to the open garden approach."

The sales planning tool had been designed to facilitate the company's door-to-door marketing campaigns, where field sales might approach modeled prospects and drop flyers in targeted neighborhoods. With the traditional "door knocks" potentially shelved with the continued spread of COVID-19, Bridgetree quickly created a proprietary phone banking system for the purpose of calling prospects and lapsed customers. The flexibility afforded by the open garden approach proved especially valuable for this use case, as it was an on-the-fly adjustment made necessary by an unexpected turn of events.

The system pulls prospect information from Redpoint to provide sales reps with previously unavailable insights to help guide the rep through the call and close the lead. Returning call data back to Redpoint, analysis on the orchestration side and modeling will help fine-tune a rep's daily prospect list to increase their conversion rate. This speaks to the power of the consistently updated Redpoint Golden Record; the disposition of thousands of previous calls provides insight into larger audience behavior, which can help predict the behavior, which the company uses optimize lead prioritization.

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Single Point of Control

Redpoint's intelligent orchestration capabilities deliver a next-best action for a customer that is based on the real time Redpoint Golden Record. A customer who contacts the call center while visiting the website to research services could receive a different offer based on what page they visit, for example.

The Twilio Flex interactions—calls, website visits, etc.—are fed back into Redpoint, so the intelligent orchestration layer can trigger a next-best action, providing an entirely new way of providing more value to the customer.

A typical occurrence will be a call center interaction to reschedule an appointment. Previously, this would necessitate a manual intervention, with the call center agents trying to find the ideal appointment time and sending an update to the branch. Now, the interaction triggers a list of suggested appointments. Once scheduled, Redpoint automatically updates the service record. Reminder notifications and confirmation emails are then sent based on business rules, location and customer preferences. In addition, the trigger becomes part of the Redpoint Golden Record and the updated record becomes the basis for any next-best action decisions. If the timing of the rescheduled appointment coincides with an increase in a particular infestation for that geographic location, a personalized offer for an add-on services could be presented, as one example.

"Leveraging the interaction in the offer history from a response standpoint will be a tremendous improvement in how they service and retain existing customers," Mamani said.

Currently, these campaigns are limited to inbound interactions. In a subsequent phase of the LIFT project, Bridgetree plans to configure and roll out multi-touchpoint campaigns on the orchestration side to specifically target lapsed customers and highly scored prospects with personalized email, SMS and other outbound campaigns.

Future plans include integrating the field service company's website, lead scoring models and survey results data into Redpoint and the Redpoint Golden Record. Through the orchestration layer, this will enable the automation of personalized nurture campaigns, with content, suggestions and offers relevant to the prospect's or customer's specific journey.

"We have leveraged Redpoint to the best extent possible and have seen amazing results. From a scalability standpoint, from an architecture standpoint, campaigns, CDP standpoint—this is an exhaustive use case, and we keep adding new stuff," Mamani said. "At the same time, we're making it easier for (the client) to manage their business."

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About Redpoint Global

Redpoint helps innovative companies ignite the full potential of data to drive superior customer experiences across the enterprise. The Redpoint CDP creates the most complete, timely and accurate unified customer profile to power any business use case, using industry-leading data quality and identity resolution combined with dynamic, no-code segmentation and activation. Marketers and CX leaders rely on Redpoint to fuel hyper-personalized experiences that yield tangible ROI in customer acquisition, engagement, loyalty and retention.

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