

Raising the Bar – How Leading Companies are Using Mobile and PEERSM Strategies to Boost Customer Loyalty

Prepared by

Dr. Phil Hendrix, Director immr and GigaOm Pro analyst



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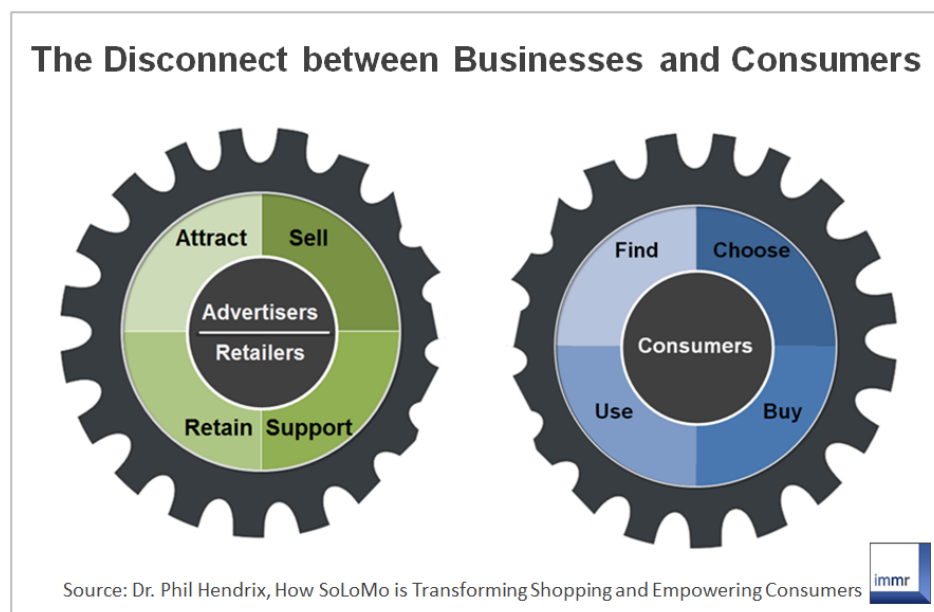
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Introduction

Acknowledging the growing importance of social media and other influences, retail guru Doug Stephens poses a [provocative question](#) – "could your business survive in a world without Marketing?" While few companies would dare consider the proposition, the question highlights the crucial role of customer loyalty – while attracting new customers is critical, businesses prosper by earning customers' loyalty.

Not surprisingly, customer loyalty has long been the Holy Grail for businesses. Loyalty provides (some) insulation from price competition, reduces the need for and cost of attracting new customers, and in exceptional cases can even produce fans who advocate on behalf of the company and its products. Despite the importance, most businesses devote far more attention to attracting customers and too little attention to customer loyalty and retention. Businesses that place a disproportionate emphasis on "attract and sell" can find themselves disconnected from consumers, as the figure below suggests.



Of course, building a base of loyal customers is a formidable challenge and only a handful of companies – Apple, USAA, Starbucks, Disney, Coca-Cola, to name a few – have reached the pinnacle. Moreover, customer loyalty is becoming an increasingly elusive goal – as more products and media vie for their attention, consumers are scrutinizing choices and spending more closely than ever due to the new economic realities.

In the battle for customers, mobile is both friend and foe, heightening the challenge but also emerging as a key competitive weapon in the loyalty arsenal. In virtually any product category, mobile allows consumers to easily discover and evaluate a wide range of alternatives, while a growing corpus of reviews, opinions and information from sources such as Yelp and other social media influences choices. With smart phones and mobile apps in hand, consumers are also being presented hyper-local offers, discounts and incentives (see for example [ThinkNear](#)). They can even select and pay with the credit card that offers the best rewards (see [Glyph](#)). Given the new transparency and array of choices, businesses can no longer afford to rest on their reputations alone.

Referring to the challenges for retail in particular, Howard Schultz, Chairman and President of Starbucks, recently [observed](#), "It has never been more challenging for a brick-and-mortar retail merchant to succeed in an enduring way." Like the [high jump](#) and other track and field events, the bar to earn customer loyalty is continually being raised, especially in hospitality and other service businesses.

Fortunately, leading companies are also finding ways to leverage mobile, delighting customers and earning their loyalty. As a result, businesses large and small are facing an imperative – integrate mobile more fully into their strategies or find themselves in a "zone of indifference," competing on features, price, availability, and other aspects on which it is difficult to sustain competitive advantage.

Recognizing the growing significance of mobile and loyalty, three leading companies – IHG, Key Ring and AT&T – commissioned and provided input and support for this research and whitepaper. Their perspectives and the experience of other leading companies illustrate how businesses are leveraging mobile to boost customer loyalty:

- With over 4,600 hotels spanning the globe, IHG was the first hotel to offer a rewards program (1983) and now boasts the largest loyalty program in the world (71 million strong). With [dedicated mobile apps](#) for members of its rewards program ([Priority Club® Rewards](#), soon to be renamed IHG Rewards Club®), IHG is also rolling out new mobile features to enhance "[all stages of the guest's journey](#)."
- Acquired by [Gannett](#) last fall, Key Ring's [award-winning mobile app](#) allows consumers to digitize their loyalty cards and enables [businesses](#) to reward their best customers with targeted, location-based offers. Key Ring's [clients](#) include many of the largest retailers in N. America as well as a growing number of small and mid-sized businesses.
- Working with developers and partners [throughout the mobile ecosystem](#), AT&T helps companies large and small [integrate mobile](#) into their businesses and improve customers' experience, operations and results. AT&T is also one of the founders of [ISIS](#), the mobile operator consortium intent on making the mobile wallet a reality. As discussed later, the mobile wallet will transform not just payments but the entire loyalty value chain.

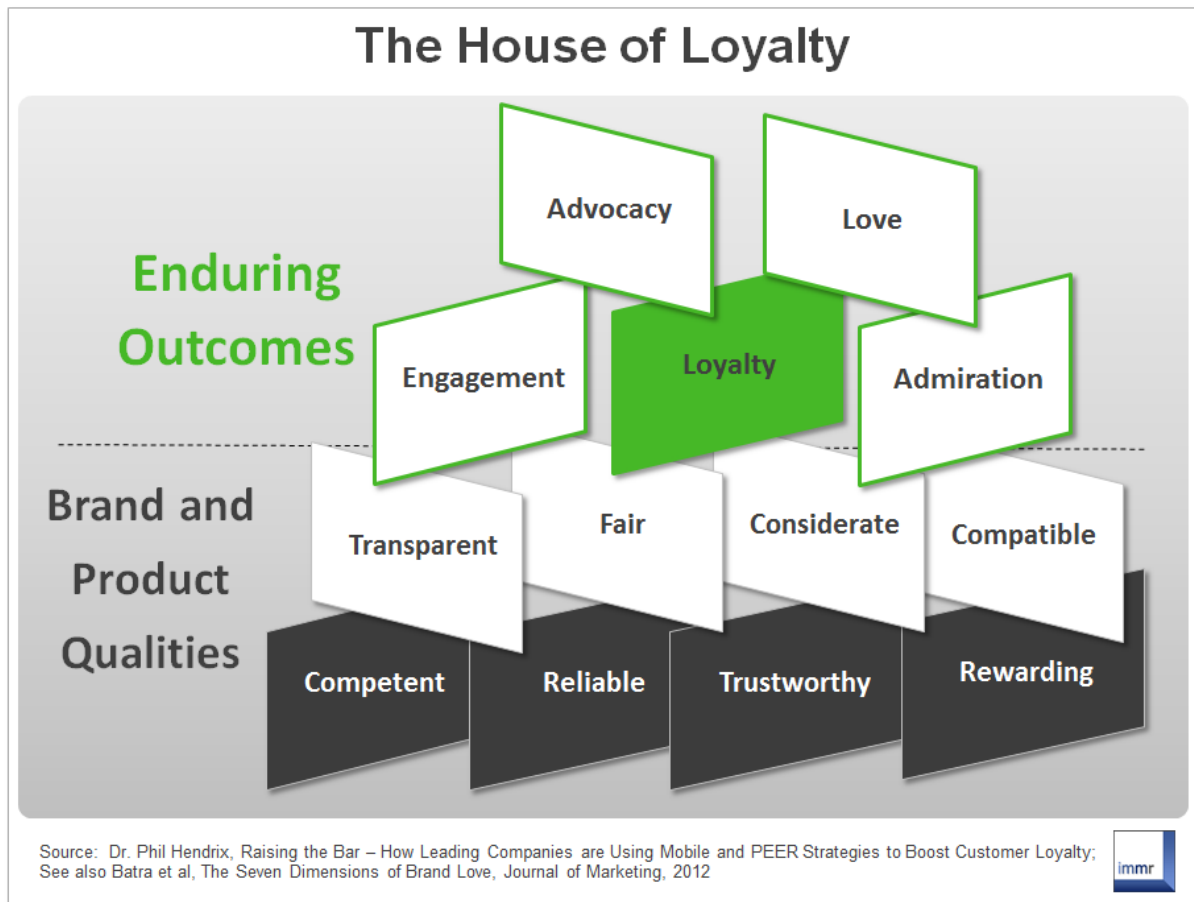
This whitepaper explores the importance and challenges of earning customer loyalty in a mobile world and describes innovative mobile strategies companies are employing to boost customer loyalty.

The next section describes the House of Loyalty, on which customer experience, trust and enduring relationships are built. To improve customer loyalty, four categories of mobile strategies are introduced – personalizing, enabling, enhancing and rewarding, referred to as PEERSM strategies. Specific strategies and tools within each category are presented, along with compelling examples for each. The final section provides an assessment of the current state of loyalty practice on 12 PEER strategies and links those strategies back to the key pillars in the House of Loyalty.



The House of Loyalty

Nearly 25 years ago two MIT professors, John Hauser and Don Clausing, published an important article in the Harvard Business Review that had an enormous impact on strategy and practice. In the [House of Quality](#), the authors showed how a product's features can and should be linked to customers' needs and preferences, notions which are now widely accepted and employed. While product performance and service are important cornerstones, earning customer loyalty requires going beyond specs and features, as shown in the diagram below.



The House of Loyalty depicts both the key outcomes and the drivers that produce them. The most important outcome, Loyalty, represents an *"enduring attachment or bond to a brand or company."* Loyalty is often accompanied by other significant outcomes, including admiration, a feeling of exclusivity ("this is the brand for me"), engagement, investment ("I care about the brand") and a sense of ownership. In extraordinary cases, the attachment can be intense, with consumers [advocating](#) and even expressing their [love](#) for a brand or product.

Loyalty extends well beyond satisfaction – as shown time and time again, customers may be satisfied with multiple brands, but not have a strong attachment to any one. Absent a strong attachment, customers are susceptible to competitors’ offers and likely to purchase multiple brands. Loyalty should also be distinguished from merely repeat purchasing – consumers may purchase the same brand over time for convenience, familiarity, habit and other reasons that have little to do with loyalty.

Considerable evidence suggests that loyalty is in short supply – in most categories, less than one in five consumers are “loyal.” Given the significance and value, it is clearly important to understand the factors that produce loyalty. While some drivers are specific to categories, drivers that apply across many categories are shown in the table below.

Drivers of Customer Loyalty	
Competence	Excels in delivering on core value proposition (product-service quality)
Reliability	Consistently delivers, keeps promises and stands behind products
Trustworthiness	Deals with customers in an open, honest fashion
Rewards	Reinforces buyers and users with extrinsic and intrinsic benefits
Transparency	Communicates with customers openly and effectively
Fairness	Policies and employees place customers’ interests first
Compatibility	Company’s values and experience closely match customers “ideal”
Attentiveness	Pays attention to customers, learns and uses insights to adapt and improve

As illustrated in the following sections, companies are discovering innovative new ways to leverage mobile to deliver on the drivers above and earn customers’ loyalty.

PEER Strategies to Improve Customer Loyalty

At the center of companies' efforts to earn customer loyalty, mobile strategies can be organized into four categories based on their primary purpose, as shown in the diagram below.



An overview of PEER strategies is provided below, while specific strategies within each category are discussed in the next section.

- **Personalizing** – armed with data from a variety of sources, including consumers themselves, companies are using mobile to deliver communications, offers and experiences tailored to individual consumers. For instance, guests participating in [Disney's recently announced RFID program](#) gain the benefit of remarkably personalized experiences – the bracelets, called MagicBands, allow Disney characters to refer to guests by name, mention their home town, ask how they liked attractions visited earlier in the day, etc. While not for everyone, many guests are likely to appreciate the intimate, personalized experience the innovative program offers.
- **Enabling** – increasingly, companies are using mobile solutions to help customers accomplish their goals while minimizing the time, cost and effort required – for instance, the Home Depot and other retailers are providing [in-store maps](#) and other aids to help smart phone users locate products, [find deals](#) and even bypass checkout. IHG and other leading hotels are implementing solutions that allow guests to check-in and gain access to their room using their mobile device, saving the customer and the property time and labor. By reducing time, effort and other “frictions,” enabling strategies make it easier for customers to accomplish their goals with minimal effort and in the process elevate a brand or product above competitors.

- **Enhancing** – in addition to minimizing and even eliminating frictions, mobile solutions are being used to surprise and delight consumers. For instance, in Australia McDonald's is placing QR codes on product wrappers – by scanning the codes consumers can [view the origins](#) of ingredients in their meal, e.g., the farm and even the specific date on which the potatoes for the fries in an order were picked. Apple's Siri and Google Now are examples of a growing number of mobile applications using AI ([Artificial Intelligence](#)) to anticipate and, at least at present, delight consumers. And companies are focusing on opportunities beyond product and service quality. As IHG's Michael Menis [observed](#), "we're connecting with guests throughout their stay experience." Over time, consumers will come to expect these types of enhancements from all businesses.
- **Rewarding** – companies are using mobile to reward customers in novel, new and more effective ways. For instance, with mobile rewards and [wallet-like capabilities](#), consumers can use their smartphones to redeem points not just for hotel stays, but for amenities, incidental purchases in the gift shop and many other purposes. In addition to points and rewards, companies are also using mobile solutions to reinforce consumers' behavior – Nike shoes, for example, allow users to record and post the number of miles run; working with [Badgeville](#), [Bunchball](#) and other experts, brands are incorporating recognition, challenges and [other mechanisms](#) drawn from gamification and [behavioral economics](#) to reinforce individuals. These reward mechanisms are especially important in fitness, healthcare, energy use and other categories where "[shoulds](#)" (vs. wants) are difficult for consumers to achieve on their own.

While mobile can be used to enable, enhance and reward customers without detailed knowledge of the individual, personalization makes each of these much more effective – for instance, knowing a guest's profile (demographics, business vs. personal traveler, arriving by car vs. plane, single vs. family traveling, etc.) allows a hotel property to tailor the types of services, amenities and offers featured for that guest.

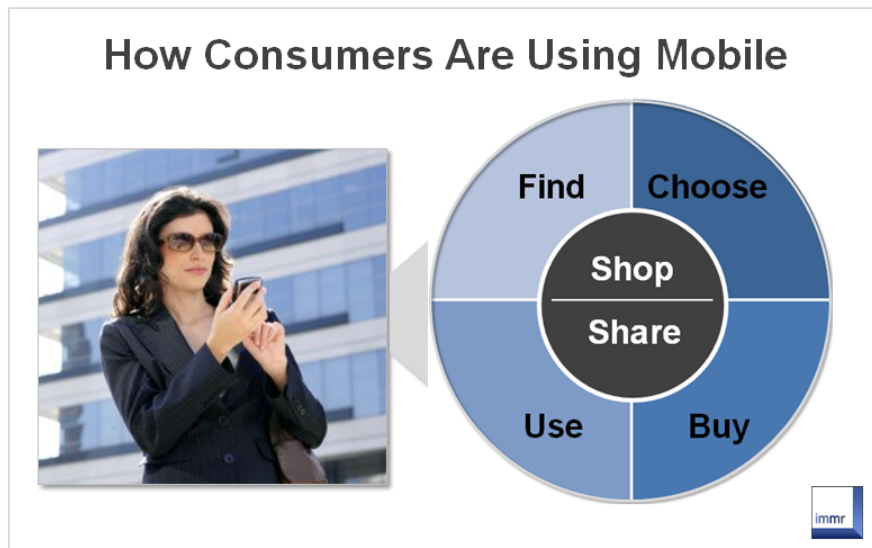
Some of the benefits of personalization can be delivered without knowing the identity of a particular consumer – for example, services such as [PlaceIQ](#) and [JiWire profile audiences](#) by time and place based on patterns gleaned from historical data over time. As a result, location and time can be combined with other contextual clues (e.g., weather, traffic, surroundings), allowing a company to tailor communications to an audience. Of course, having more extensive information about a particular consumer allows for even [greater personalization](#) – thus, companies are encouraging consumers to download apps, enroll in loyalty programs, link their social media profiles and share profile information in other ways. With premier department store [Neiman Marcus' mobile app](#), customers can alert sales associates as they enter the store and give associates access to their shopping history and Facebook profile.

As discussed in a later section, by delivering valued, personalized experiences and fulfilling the role of "trusted partner," companies and brands can earn consumers' cooperation. Reaching existing as well as new customers at the right time is also critical – in its [2012 Summer campaign](#), IHG employed NFC, SMS, and QR codes to make it easier for guests to enroll in Priority Club Rewards and for members to register for special promotions.

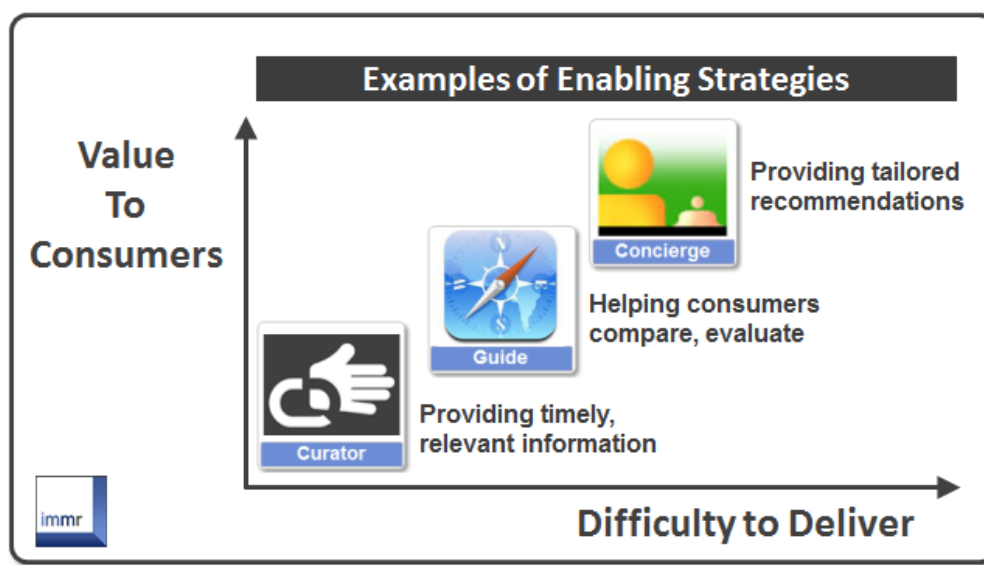


Enabling Strategies

Over the course of a week the average consumer makes hundreds of decisions, many of them recurring and familiar – like where to stop for coffee on the way to work – and others that are more significant, like booking an upcoming vacation. Bill Keen, IHG's Director of Mobile Solutions, noted that consumers are using mobile not just to book hotels but also to manage their stay. As these examples suggest, "consumer behavior" consists of finding, choosing, buying and using products and services. Consumers are using mobile at each step – for instance, [viewing store circulars](#), searching for businesses, comparing prices, paying and even obtaining customer service. They are also sharing their experiences – for instance, checking-in, posting reviews, providing feedback to merchants and service providers, etc.



Brands and retailers are using an array of strategies to enable consumers to accomplish these tasks.



Enabling Strategies



Consumers face a dilemma – surrounded by information, they can pay attention to only small fraction. However, when choosing a product or making a purchase, consumers are often unable to access relevant information when needed due to the vast quantity, fragmented nature and lack of filters. To mitigate, brands and retailers are using mobile solutions to curate information, taming the glut and providing consumers with access to just what is needed or desired, at the right time. With [QR codes](#) and soon [NFC](#) (near-field communications), consumers can scan an ad, poster or the product itself to pull up a wide range of information, including product features, ingredients, stores, and other information.

Emerging platforms and mobile apps are revealing more and more information and make the information visible. For instance, [Retailigence](#) platform and APIs make it easy for retailers to show product inventory and pricing. [CityMaps](#) provides details on nearby attractions, presented elegantly on a dynamic map, showing not just establishments, but real-time updates from social media as well as the nearest transit options, along with current schedules. In addition, as the app learns more about you, its maps “[become more personalized](#),” e.g., hiding businesses that you don’t use. Apps like [Goodguide](#) allow consumers to find information on products that is not easily accessible – for example, the presence of allergens that a consumer might wish to avoid, or the country of origin.



Consumers value not just information, but assistance in comparing, evaluating and making choices. To some extent, filtering information is helpful – for example, consumers wishing to dine at a QSR (quick-serve restaurant) can find locations, but also determine which restaurants have heart-healthy alternatives on the menu. In many cases apps from third parties have emerged to provide assistance to consumers. [Yelp](#), for instance, provides [indispensable advice](#) based on detailed reviews from a dedicated group of Yelpers. In travel, TripAdvisor and a host of other sites aggregate key information and guide consumers in their choices. Recognizing that 3 out of 4 guests read reviews before booking, IHG [introduced](#) a new system last year to allow guests to post online reviews of its properties. [Decide](#) reduces risk by advising consumers whether prices are apt to fall in the next 30 days – for a small monthly fee, Decide will even [protect its members](#) should prices drop on an item purchased.

Merchants and brands play a key role by supplying accurate, up-to-date information to third-party apps. Beyond providing information and APIs (application programming interfaces), innovative brands are also guiding consumers as they purchase and use products. P&G’s Tide offers the [Stain Brain](#), a mobile app that helps consumers remove stains “on the spot.” Charmin’s [SitORSquat app](#) helps consumers find public restrooms.

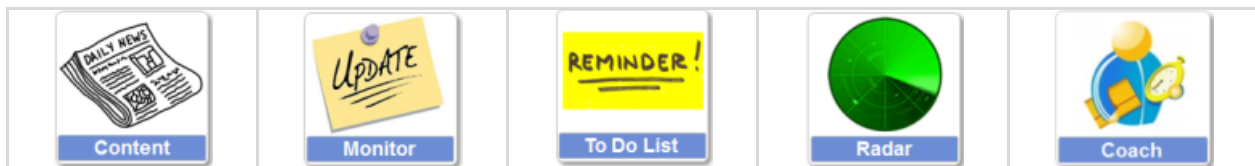


The [role of concierge](#) is much broader than that of Curator or Guide. In a typical day, a concierge at an up-scale hotel fields hundreds of questions and fulfills dozens of requests. With an intimate understanding of guests' needs and encyclopedic knowledge, in many cases based on first-hand experience, concierge provide services that extend beyond the boundaries and operations of the hotel – in the truest sense of the word, they embody hospitality. Services such as [Signature](#) and [GuestDriven](#) aim to help retailers, hotels and other businesses deliver the benefits of a concierge via mobile. IHG's InterContinental Hotels & Resorts was the first hotel brand to introduce a [concierge app](#) for the iPad. IHG's Bill Keen indicates that even more robust capabilities are being developed.

The concept of concierge is also being extended to other product categories, especially food, entertainment and retail – as Starbucks CEO Howard Schultz [observed](#), "we have to be relevant to our customer when they are outside our four walls... [and] that applies to any consumer brand today, whether Starbucks or a product like Tide."

Delivering on the concept of Concierge requires learning enough about a customer to personalize the response and providing information and assistance that goes beyond that available from other sources. Compared to Curator or Guide, Concierge is a more difficult role to fill.

In the current best-selling book [To Sell is Human](#), Daniel Pink observes that "in both traditional sales and non-sales selling, we do better when we move beyond solving a puzzle to serving a person." In addition to the strategies above – Curating, Guiding and serving as Concierge – companies are using mobile to enable and serve consumers in many other ways. Other effective strategies include producing and delivering compelling, [contextually relevant content](#); monitoring, detecting and reminding customers of needs, options, and [offers](#) (especially those that are nearby); and even serving as "coach," particularly in categories such as energy, [fitness and healthcare](#) where "shoulds" are prevalent but, like resolutions, difficult for the average person to achieve.



The opportunities to leverage mobile to improve customers' experience are boundless – as [David Christopher](#), AT&T Mobility's Chief Marketing Officer noted, consumers are rapidly adopting "Mobile First" strategies, e.g., relying on mobile apps and solutions whenever and wherever possible. Christopher also notes that mobile plays an important role in enabling employees, a phenomenon that is transforming retail, as [Nordstrom's](#) has demonstrated. Of course, consumers are likely to rely on some combination of mobile and conventional channels, which is why companies are pursuing [omni-channel strategies](#). As artificial intelligence and speech recognition capabilities advance, solutions such as Google Now and Apple's Siri and Passbook will raise consumer expectations and the bar for companies pursuing Enabling strategies.



Enhancing Strategies

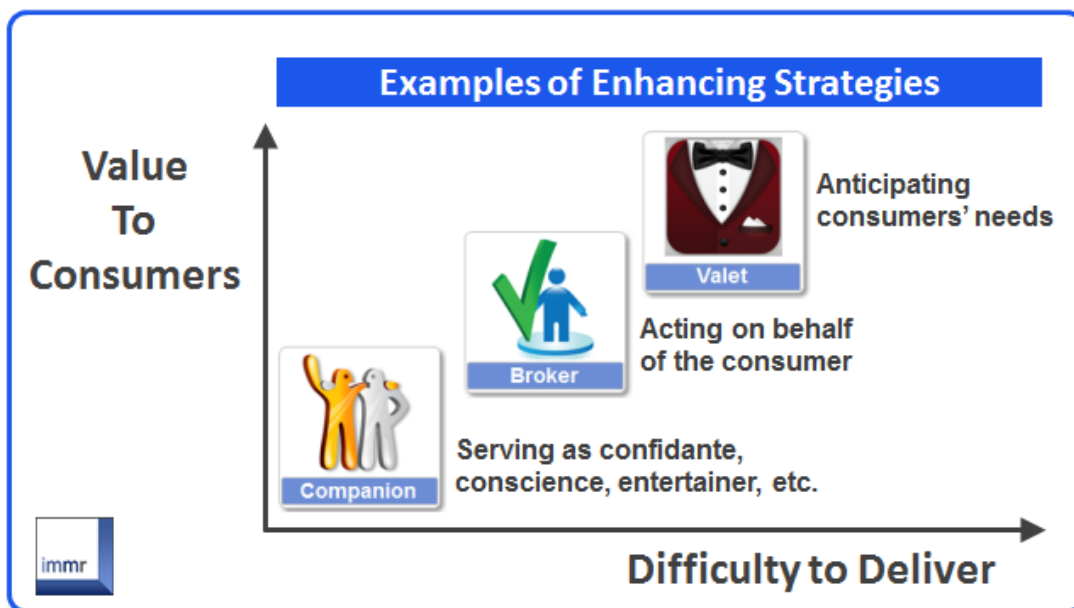
While the line between Enabling and Enhancing is not black and white, there is a distinction. Enabling strategies focus on helping the consumer be more efficient and effective at tasks, or as Anthony Ulwick of [Strategyn](#) refers to it, the "jobs to do." Enhancing strategies, on the other hand, go beyond these identifiable tasks to leverage mobile in ways that surprise and delight customers.

In the simplest sense, Loyalty may be thought of as a ratio of the benefits a customer receives relative to the effort required, accumulated over time. Whereas Enabling strategies focus on minimizing effort – the denominator – Enhancing strategies focus on ways to expand the numerator, e.g., deliver benefits that surprise and delight. In some ways, these are similar to the "excitement factor" in the [Kano model](#).

$$\text{Loyalty} = f \left(\frac{\text{Customer Benefits}}{\text{Customer Effort}} \right)$$

By definition, opportunities to enhance customers' experiences are generally not anticipated – however, when experienced they have the capacity to surprise and delight. Remember the first time a hotel left mints or chocolate on your pillow? Or the first time you were greeted at the entrance of WalMart? Of course, as both examples suggest, over time even novel enhancements may come to be expected

Brands, retailers and developers are introducing a dizzying array of mobile innovations to surprise and delight customers, as the categories below and examples on the next page suggest.



Enhancing Strategies



Mobile devices already serve as consumers' companion. 9 out of 10 smart phone owners [report](#) that they "almost always" have their device nearby or with them. With consumers shifting from the internet and [devoting more time](#) to mobile apps, time spent on mobile apps is rapidly approaching the time consumers spend watching TV.

The term companion has many different meanings, of course – ranging from someone that entertains and keeps one occupied to someone who cares and looks out for one's interests. For a brand or merchant, fulfilling the role of companion implies going beyond the role of advertiser – for example, providing entertainment or connecting consumers with others with relevant knowledge, similar interests, etc. Recognizing that "locals know best," IHG's Hotel Indigo [encourages local residents](#) to upload photos of their favorite things to see and do, which are then shared with hotel guests.

Tom Daly, Group Manager of Global Connections at Coca-Cola, observes that "whether shopping, watching TV, or enjoying a concert, consumers are apt to have their mobile device in hand." To be part of that experience, Coke is delivering "[inexpensive pleasures](#)," increasingly via mobile. For example, as part of the company's "Share a Coke With ..." campaign in Australia, 150 of the most popular names were [placed on Coca-Cola bottles](#) so that "consumers can have fun finding their friends' and family members' names and then enjoy sharing a Coke together." Coke also produces original content – for instance, showing individuals caught on security cameras doing random acts of kindness.

The ability to connect "things" to the internet is forging many new opportunities for mobile Companion strategies. As Luke Wroblewski asserted in [Wroblewski's theorem](#), "anything that can be connected to the Internet, will be." AT&T's [Emerging Devices Organization](#) (EDO), led by Glenn Lurie, helps companies develop [connected products](#) that, in essence, serve as valued companions. [AT&T's Digital Life](#) will connect consumers to their homes (security, energy, content, etc.) and family members via wireless automation. The extraordinary [success](#) of the Nest Thermostat, designed by the ex-Apple guru who developed the iPhone, and Nike's Fuel Band illustrate the potential of connected products.

The growing popularity of mobile in automobiles presents automakers and brands in other categories, especially travel and entertainment, with additional opportunities to fulfill the role of companion. As GM's Alfred Tom [noted](#), "When people get in their cars, they feel like they are not connected anymore... mobile apps [can] make people feel connected."



A broker serves as a "trusted intermediary," acting on the consumer's behalf, arranging matters, and in some cases even completing transactions. Playing the role of broker has created a significant new business for Groupon, Fab, Angie's List, ScoutMob and growing list of other companies, many of them start ups.

The opportunity exists for other trusted business partners to play this role as well. For example:

- In real estate, Trulia's mobile app allows realtors and consumers to set up profiles with preferences and other parameters and receive alerts when properties matching those criteria become available.
- Connected via mobile devices, hotels can now offer specials and [experiences](#) to guests not just at time of booking but throughout their stay, for both on-property and off-property products and services
- Incorporating functionality like [ThinkNear's situational targeting](#) into their mobile apps, theatres could offer patrons real-time specials on nearby restaurants, parking and other services
- Brands could follow Amazon's [Subscribe & Save](#) program and arrange subscriptions for direct delivery of regularly consumed products, with authorization and alerts delivered via mobile.

Since deals, by definition, have limited supplies and are available for a limited time, there should be many untapped opportunities for brands to employ mobile and serve as broker. Brands and merchants will also need increasingly sophisticated algorithms to optimize their participation in the many broker channels that are emerging.

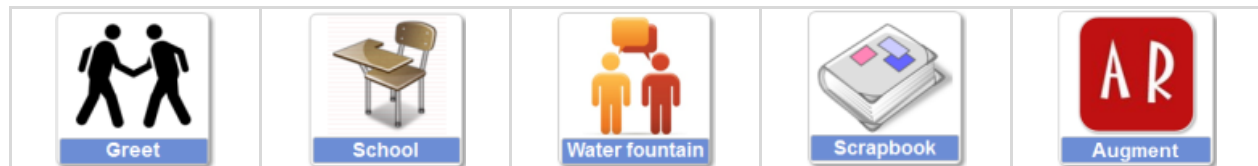


Valets possess intimate knowledge of their employer's needs, requirements, idiosyncrasies, etc. and they fulfill their employer's requirements without being asked or instructed to do so. While few consumers are familiar, much less ready to allow mobile valets to act on their behalf, two recent mobile innovations suggest the potential:

- [Alohar](#) has created a Mobile Location Behavior Analytics platform based on "persistent-sensing technologies." Developed by ex-Google Sam Liang ("the guy who [put the blue dot](#) on Google Maps"), Alohar enables a whole new class of mobile applications that automatically understands a user's behavior and provides highly customized services to the user at the right time and at the right place.
- [Google Now](#) for mobile "gets you just the right information at just the right time." Without having to ask, "cards appear when they're needed most," allowing you to "stay on top of what's happening in your life, including what you need to do, where you need to go, and how to get around."

Opportunities to leverage mobile to surprise and delight customers are limited only by companies' imaginations – options range from the here and now to a radically different future in which brokers and valets, with intimate knowledge of customers' preferences and behavior, are acting on their behalf. As designer Richard Seymour recently [observed](#), "what we can do technologically exceeds our ability to imagine what to do with it."

In addition to the three strategies outlined above, there are numerous other avenues to explore and develop, including (i) greeting customers (a la Foursquare, [InMarket](#), and other services); (ii) educating and [providing feedback](#) to customers so that they can make better choices; (iii) linking customers via social networks (extant and temporary – for example, [KLM's Meet & Seat program](#)) for exchange and interaction (the digital equivalent of water fountains in the workplace); (iv) helping customers capture, store and (optionally) [share traces](#) (photos, feedback, etc.) of their experiences (witness the [success of Pinterest](#)); and (v) using [Augmented Reality](#) to give customers ready access to other experiences that may be of interest – for instance, a guided tour of nearby sites.



Rewarding Strategies

Beyond the core benefits delivered by a product or service, companies reward consumers for loyalty and other valued behaviors in a variety of ways. The most significant are rewards programs – as Jon Parise of loyalty consulting firm rDialogue [noted](#), “Traditional loyalty programs are based on an easy to understand value proposition; put simply: spend-and-get.” Following the introduction of rewards programs on a massive scale by American Airlines in the late ‘80’s, businesses in virtually every category now reward consumers for miles flown, hotel stays, packages shipped, charges to credit cards, and even shopping. And the programs are enormously popular – IHG’s award-winning [Priority Club](#), the largest rewards programs in the world, has over 71 million members.

Rewarding strategies include more than rewards programs, however – fueled by mobile, companies now have a much wider range of strategies and options with which to motivate and reinforce consumers' behavior. These include recognition and exclusive access, but also feedback, leaderboards, competitions and other "levers" drawn from gamification and behavioral economics.

While an in-depth review of rewards programs is beyond the scope here, mobile is changing rewards in profound ways, as summarized below:

- **Enrolling Customers** – as demonstrated by IHG with its Mobile Marketing Summer 2012 campaign (mentioned above), mobile makes it easier to reach and enroll customers in loyalty programs. By reducing and eliminating the “hassles” of signing up, carrying cards, etc., apps like Key Ring and soon mobile wallets make it easier for consumers to enroll and participate in rewards programs.
- **Businesses Issuing Rewards** – historically, rewards programs have been associated with large businesses, e.g., airlines, hotels, retailers, etc. A new generation of solutions, including [Belly](#), [FiveStars](#), [Perka](#), and others are enabling small businesses to offer and optimize rewards.
- **Range of Behaviors Rewarded** – traditionally, rewards have been tied to consumers' purchases. With mobile, a wider range of behaviors can be incented. For example, [Shopkick](#) rewards consumers for shopping – “walk in with your smartphone and instantly earn kicks;” Foursquare and [Loyalblocks](#) reward consumers for “showing up;” Yelp rewards members for writing in-depth reviews; brands use programs like [Social Rewards](#) to incent consumers to share tweets and other social media; [Aetna](#), [UnitedHealthcare](#) and other health insurers are [rewarding their members](#) for exercising and reaching targeted biometric goals. Each of these examples, and many more, are enabled and accelerated by mobile.
- **Reward Types** – with mobile, businesses can recognize and reward consumers in new and different ways. Ben & Jerry's, for example, launched the “[Capture Euphoria](#)” campaign to encourage its followers on Instagram to upload images representing “euphoria,” fueled by ice cream, of course. [Winning photos](#) are being featured in Ben & Jerry's stores and ads. [Leaderboards](#), another form of recognition, are also made possible by mobile.

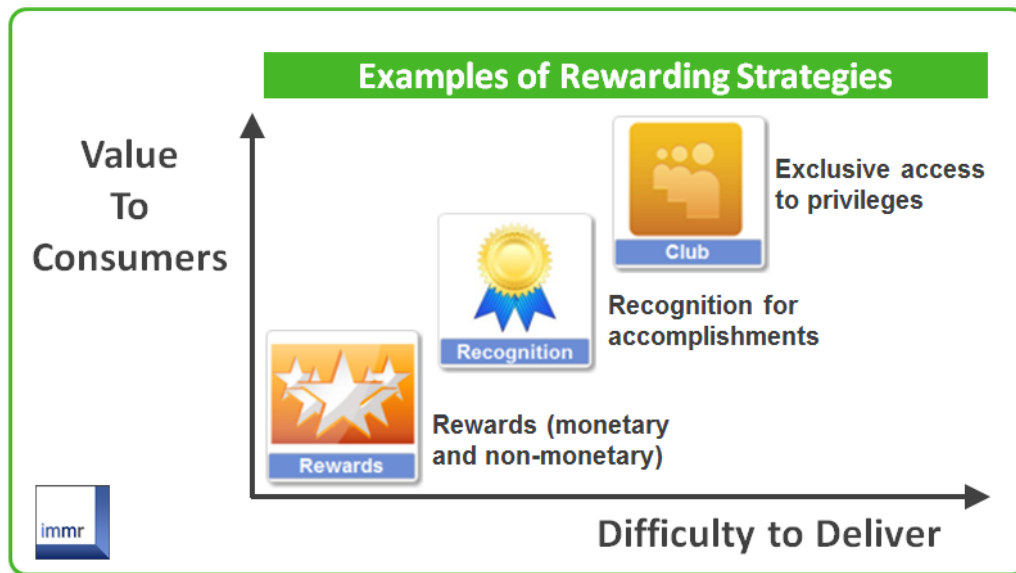


- **Rewards Tracking** – with most retailers and many brands offering rewards, the average customer is enrolled in more than a dozen loyalty programs. With programs in silos, consumers find it difficult to keep track of rewards offered, earned, thresholds within reach, etc. Partly due to these complexities, a sizable percentage of awards (30-40%) go unredeemed, diminishing the value to consumers and issuers. [Key Ring](#) remedies this problem – by scanning and storing existing "loyalty cards" on the Key Ring mobile app, consumers can manage all of their awards with participating businesses on their smartphone. Key Ring's platform also [enables businesses](#) to optimize offers presented.
- **Rewards Redemption** – when rewards programs were first introduced, awards could be redeemed only with the business issuing the rewards. Over time, [coalition programs](#) developed, allowing consumers to redeem rewards with other businesses participating in the coalition. Don Berg, IHG's VP of Loyalty and Partnerships, expects mobile will soon allow rewards program members to use points for a wide range of "instantaneous" purchases, from meals in the hotel restaurant to snacks, in-room entertainment, and more (personal interview). With emerging [mobile wallet capabilities](#), rewards will make the transition to virtual currency, allowing consumers to redeem and use the rewards in new and increasingly unrestricted ways.
- **Rewards Thresholds** – Rather than requiring consumers to accumulate points over time and reach relatively high thresholds, businesses are beginning to offer a wider variety of low-cost reward options – for example, dessert at a restaurant or a digital music download. IHG has innovated on this dimension with its [Instant Rewards](#) program – with as few as 300 points, Priority Club members can download music
- **Rewards Optimization** – with insights gleaned from Personalization, businesses can optimize and present rewards in real-time that are uniquely matched to consumers' preferences. [Visa](#), for example, can present offers to card members based on their current location and most recent transactions (informed, of course, by the consumer's transaction history). Amex recently implemented [My Offers](#), which tailors and presents [personalized offers](#) to card members based on their spending profiles. Using mobile apps such as Glyph, consumers can select the credit or debit card for particular purchases that [maximizes the value of rewards earned](#). By integrating with a business' CRM or loyalty database, Key Ring makes it possible to deliver [customized offers](#) to specific customers – for example, based on location, frequency, advocacy and other factors.

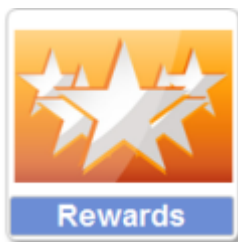
As these examples suggest, mobile is transforming rewards as we know them, extending them well beyond the conventional "spend-and-get" model. Mobile also provides an ideal platform for [experimentation](#), allowing businesses to discover and invest in "winning" combinations that unlock value for consumers and the bottom line. As in SEO (search engine optimization), SEM (search engine marketing) and [Real-time Bidding](#) for display advertising, businesses will need increasingly [sophisticated tools and strategies](#) to optimize rewards, including big data, "smarter" algorithms and rapid experimentation. Of course, the ultimate financial goal of loyalty and other programs is to increase [customer lifetime value](#) (CLV) – with the right metrics, mobile makes this a much more attainable goal.

With these developments as a backdrop, presented on the following pages are examples of Rewarding strategies that can be implemented with mobile.





Rewarding Strategies



Businesses large and small are employing mobile to reward consumers for a wide range of behaviors, including but not limited to purchases. With mobile, rewards are instantaneous, visible and (optionally) redeemable immediately, removing the lag and uncertainty that characterizes legacy programs. Mobile also offers a dynamic platform in which alternative rewards can be rapidly tested via randomized experiments. With social media, mobile users can also dramatically amplify the appeal and reach of exciting rewards.

As another example, Humana's [HumanaVitality](#) rewards program allows members to earn 'Vitality Points' for "making healthy choices and striving to achieve wellness goals." Points can be redeemed for movie tickets, music downloads, electronics, hotel stays and other rewards. Members can also [save 5%](#) on healthier food purchases at Walmart. [Humana says](#) that members "are hooked as soon as they use the [accompanying] Vitality Age app."



Companies are incorporating principles from [gamification](#) and [behavioral economics](#) with mobile to produce powerful incentives. For example, Nike recently introduced the game application [NikeFuel Missions](#). By engaging in everyday physical activities (walking, running, playing sports, etc.), users earn "fuel points." The goal is to motivate users to workout, earn more points, and surpass other users. [Analysis](#) by social media firm WaveMetrix shows that users are "eager to take up the challenges" and "love" the idea of gamifying their daily exercise.



As captured in American Express' memorable theme that spanned almost a decade (1987 – 1996), "membership has its privileges." While rewards and recognition are effective, consumers also value exclusives made available to them via membership in loyalty programs.

A popular restaurant in D.C., Ping Pong Dim Sum, is using [Venga's](#) loyalty platform to reward members with special experiences like a mixology demonstration. As the owner [notes](#), "we can engage with customers in ways that we weren't able to before." He also summarizes the benefits of mobile nicely. "We also liked that is completely mobile, including redemptions... it's important to make it as easy for guests as possible, so they don't have to remember to bring their swipe card. We're able to calculate the lifetime value of our guests more accurately."

In addition to rewards, recognition and exclusive experiences, companies are using mobile to reinforce consumers in other ways. For example, (i) extending a digital "greeting" to them as they check-in or arrive at the premises; (ii) "holding up a mirror" so that customers can capture and refer back to images and other memories that remind them of their experiences; (iii) making "unpublished" rewards available to guests, which offer the element of surprise and delight; (iv) competitions, both with against their previous achievements but also against others; and (v) posting results on a leaderboard that can be viewed by others, adding social elements of competition and peer pressure.



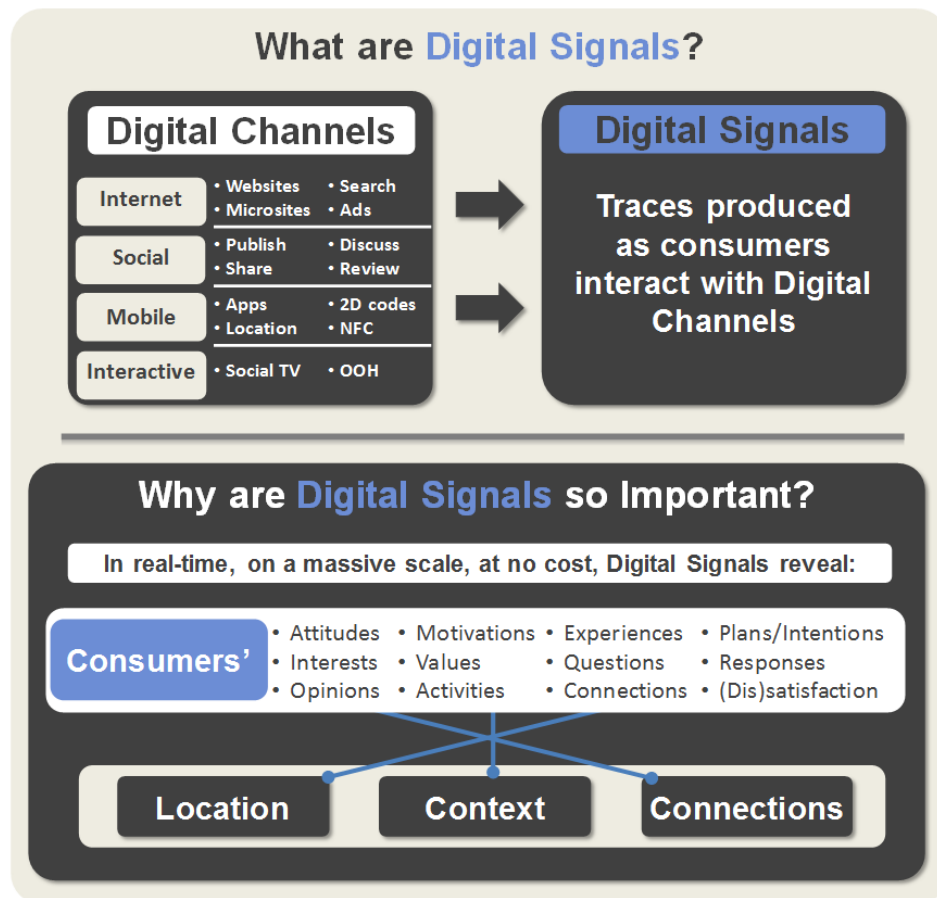
For more on gamification and loyalty, see the forthcoming book [Loyalty 3.0](#) by [Bunchball](#) founder and gamification expert Rajat Paharia (scheduled for publication late May 2013).

While each of these strategies could be implemented without mobile, combining Rewarding strategies and mobile will generally be much more effective.

Personalizing Strategies

Personalizing involves the use of customer “profile information” to tailor communications, offers and experiences presented to a customer. The nature of information in various profiles varies widely, as does the specificity of the personalization. At one end of the continuum are broad descriptors, such as age, gender, location (DMA or ZIP), etc.; at the other extreme are more detailed profiles, including recent purchases, preferences, social media contacts, places visited, and even plans and intentions extracted from e-mail or [social media](#).

As consumers interact with various digital media – including the internet, social media, and mobile devices and apps – the amount of information “tracked” is growing exponentially, as the Wall Street Journal documented in its series “[What they know](#).” A [recent whitepaper](#) referred to these traces as “Digital Signals” and highlighted their enormous potential, as shown below.

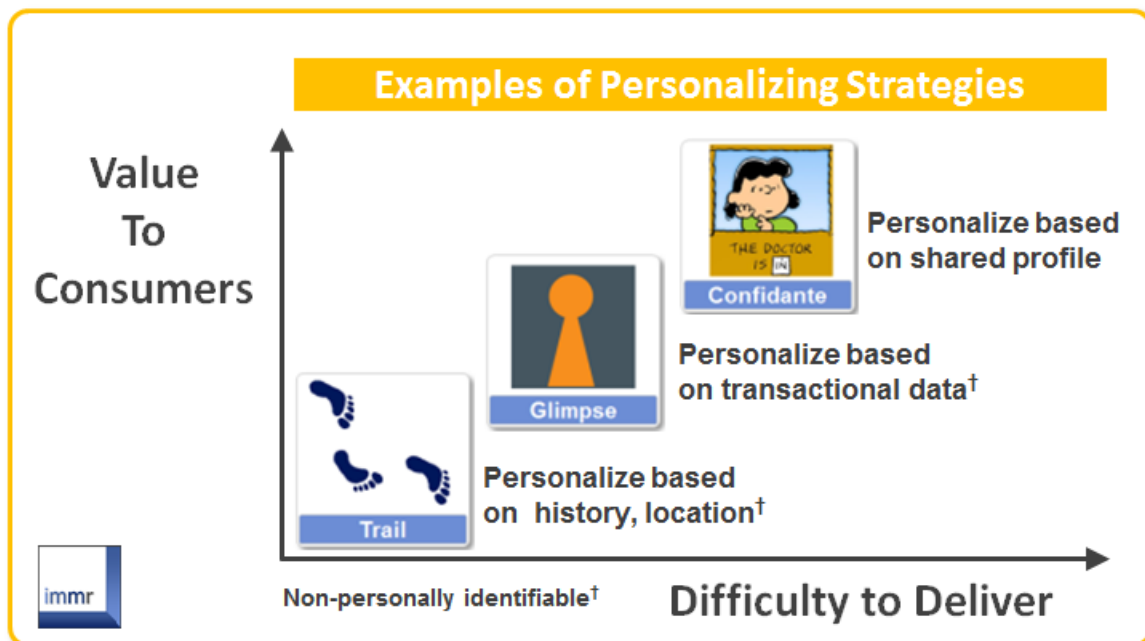


Source: Tuning into Consumers' Digital Signals, GeolQ Whitepaper, Dr. Phil Hendrix, [immr](#)

While significant concerns and issues surround consent, security and privacy, an emerging point of view from industry experts and regulators outlines how these data should be captured, stored and used. For example, [AIMA](#) proposes a useful framework called [TACT](#), summarized on the next page:

AIMA's TACT Framework	
Transparency	Provide customers with information on the specific data being collected, the manner in which it is being collected and how it will be used.
Added Value	Make customers aware of the value they are receiving, e.g., how they are being compensated for providing their personal data.
Control	Give customers control over data they have provided by (i) telling them with whom their data are being shared and (ii) giving them the ability to opt out of data collection at any time.
Trust	Collect only the data needed and use the data collected to build consumer value.
Source: The New Data Values , AIMA, Nov. 2011	

The Federal Trade Commission has also just [issued a staff report](#) recommending ways that key players in mobile inform consumers about their data practices. Apparently satisfied with security and control, a growing number of mobile consumers are sharing more and more of their Digital Signals with trusted business partners. The key drivers of consumers' willingness are (i) value received and (ii) nature and extent of information shared. Previous sections discussed how companies can use data to add value – e.g., Enabling , Enhancing and Rewarding consumers. Shown and explained below are three Personalization strategies, based on a continuum reflecting varying types and amounts of information shared by consumers.



Personalizing Strategies[†]



In the simplest form, businesses can personalize messages, offers and experiences based on a mobile consumer's trail of behaviors. For example:

- With knowledge of a consumer's location (even approximately), an abundance of contextual data linked to location is available from sources such as [Factual](#) and [PlacelQ](#). The contextual data – including weather, surroundings, behavioral patterns and tendencies observed over time, etc. – allow businesses to segment and tailor accordingly.
- [JiWire's Location Graph](#) takes this one step further by segmenting users based on past and present locations.
- As mobile consumers [search](#) and visit websites on the internet, additional “bread crumbs” are generated, creating opportunities to personalize based on [interest and intent](#).
- While Trail may imply location and foot streams, consumers leave other digital traces as well. For example, [Flurry](#) segments users into some 20 personas, based on mobile apps used in the last 30 days. These “targetable segments with shared interests” include auto enthusiasts, business travelers, sports fans, and others.

As in-store mapping and location become more widespread, even more granular data will become available.



Consumers' interactions and transactions can also provide a Glimpse that permits personalization.

- As consumers share on social media, a number of services allow businesses to recognize and respond to relevant posts in real-time.
- Grocery and drug stores, powered by [Catalina](#) and similar programs, offer coupons on the back-of-receipt tailored to the customer's current and (if enrolled in a loyalty program) history of purchases.
- [Visa](#) and [American Express](#) are using cardholders' transaction data and histories as well as location to present personalized offers on mobile devices, in real-time at point-of-sale.

Businesses may also ask consumers to share a glimpse of their status, plans or even mood. On its home page online music service [Songza](#) prompts users to enter the day and time (e.g., Saturday evening) and to choose from five appropriate “moods” or occasions – for example, eating dinner or relaxing at home, allowing Songza to suggest the most appropriate playlist.



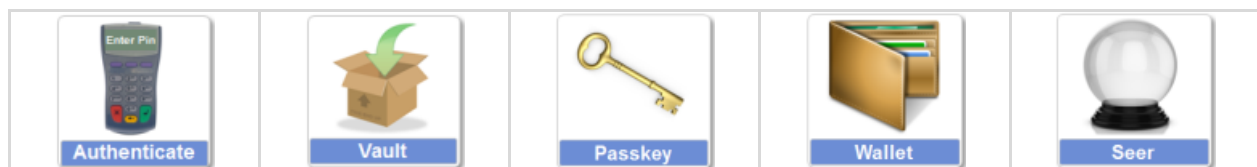
The holy grail of Personalization is Confidant, in which mobile consumers share not just profile, location and transaction histories, but much richer, detailed information about themselves. For example:

- Consumers routinely [allow](#) Google to determine their current location; extract insights about their interests from G-mail; compile a profile based on websites visited, posts on Google+; etc.
- Facebook, of course, is attempting to capitalize on its extensive [social graph](#), with varying degrees of success.
- [Hunch](#), recently acquired by eBay, uses THAYs (Teach Hunch About You) combined with machine learning to make recommendations based on affinity between people. The team's ambition is to "build a '[Taste Graph](#)' of the entire web, connecting every person on the web with their affinity for anything." See the Hunch mobile app in action [here](#).

The value of knowing more about consumers' purchase patterns, especially when combined with location and other mobile user data, is driving the epic [battle for mobile payments](#). AT&T is part of the mobile operator consortium developing [ISIS](#), while merchants, Google, Paypal, and others are developing competing mobile payment platforms.

[†]Note: In each of these examples of Personalization strategies, AIMA's principles of TACT (transparency, added value, control and trust) apply.

There are many other possibilities and variations on mobile Personalization strategies, including (i) [Authentication](#), in which mobile devices and biometrics are used to confirm a consumer's identity; (ii) [Vault](#), in which a consumer stores detailed data based on their mobile behaviors (see, for example [Alohar Mobile's PlaceMe](#) application, which automatically remember all the places a user has been); (iii) [Passkey](#), in which a consumer stores, retrieves and possibly shares with others designated information (for example, a [location and context aware wish list](#)); (iv) [Mobile wallet](#), as described earlier; and (v) last but not least, that of [Seer](#), with AI-based services such as [Kimera](#) that are "aware of your goals" and can "understand your actions."



As Bill Hanifin of [LoyaltyTruth](#) has noted, personalization is one of the "[unfilled promises of Loyalty marketing](#)." However, mobile presents enormous opportunities to realize the potential – when consumers agree to share their location, transactions, plans and other intimate data, responsible business partners are in a unique position to fulfill the promise with PEER strategies – Personalizing, Enabling, Enhancing and Rewarding consumers with significant benefits and compelling experiences.

How Does Social Fit into Loyalty?

Commenting on a previous draft of the whitepaper, Mark Evans, founder and director of [Converge Labs](#) and organizer of the [Mobile-LoCo](#) and [Social-LoCo](#) conferences, suggested that the PEER framework be expanded to include social and relabeled SPEER. His point is an important one. Social networks and media – especially in combination with mobile and location – are a growing part of every aspect of consumers’ lives and therefore a critical element of PEER strategies. Here is a brief overview of the implications and examples of companies integrating social into their loyalty efforts across PEER:

- **Personalization** – to a [remarkable degree](#), consumers are posting, exchanging and sharing via Facebook, Twitter, FourSquare, Pinterest and other social media. Along with location and other “digital signals,” these traces offer enormous insight into consumers’ interests, plans, and motivations. While there are critics (including [Geoffrey Moore](#)) and concerns re: [privacy](#) and the [use of social data](#), more and more companies are attempting to utilize these insights to enhance customers’ experiences. A recent immr research study found that a majority of smart phone owners are willing to share their social media profiles with [trusted](#) business partners for personalization.
- **Enabling** – as mentioned earlier, one key PEER strategy is curating and making relevant content available to customers. As the popularity of third-party sources like Yelp, TripAdvisor and Amazon has shown, consumers value other users’ opinions. Given the value of user-generated content, more companies are embracing the phenomenon and making what Vivaldi Partners calls “[Social Currency](#)” a critical part of their dialogue with customers. For example, IHG’s [Priority Club Connect](#) provides a forum for members to interact with IHG as well as fellow members. [Home Depot](#) has an elite group of employees who split their time between helping customers in stores and supporting customers via social media. Despite these examples, recent [research by SocialBakers](#) shows that many brands fall short in responding to customers via social media.
- **Enhancing** – with social media (posts, photos, etc.) increasingly “geo-tagged,” apps such as [SPUN](#) are delivering content that is [contextually relevant](#) to individuals and places. As previously mentioned, [KLM’s Meet & Seat program](#) illustrates an effort to “match up” customers based on their social media profiles and preferences.
- **Rewarding** – game dynamics are an increasingly popular component of rewards strategies. As Amy Kim has shown, many of the key dynamics are [social](#) – for example, expression, competing, collaborating, etc. As discussed earlier, PEER strategies of recognition, competition, access to privileges exclusive to “club” members, and others all incorporate social.

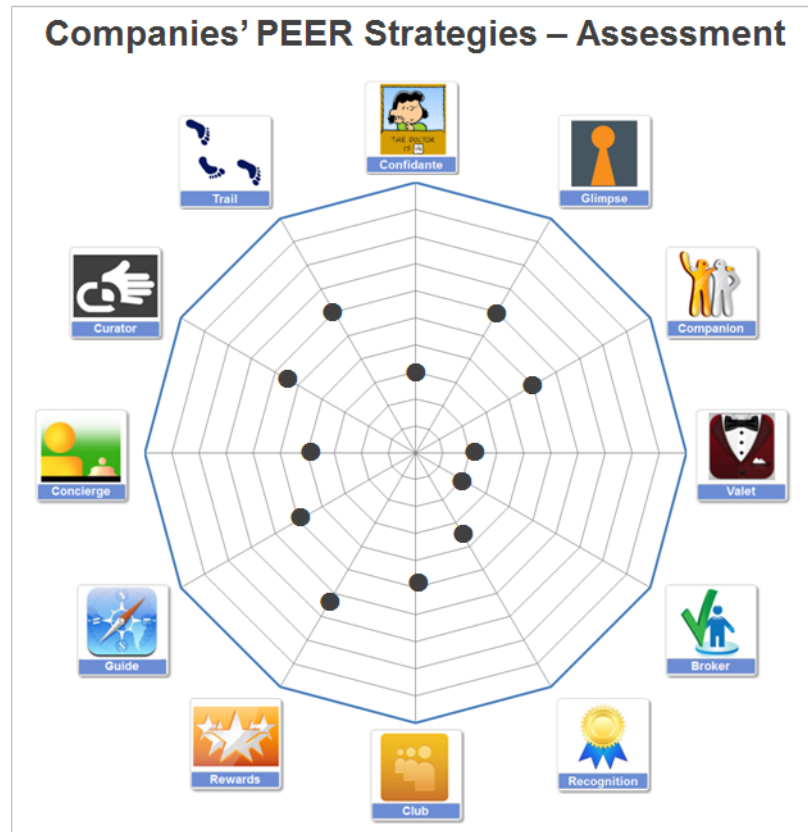
As these examples suggest, social is an increasingly vital part of customers’ relationships and dialogue, not just with others in their social networks but with companies via social media as well. Recognizing the growing importance of social in loyalty, Bill Hanifin [predicted](#) that “three words would define loyalty marketing in 2012” – social, mobile and data. Since then Hanifin has integrated these three concepts into a useful framework called Contextual Loyalty. For insightful discussions about the future of social and loyalty, see LoyaltyTruth’s [2013 Loyalty Manifesto](#) and Vivaldi Partners’ [Social Currency 2012](#).

As customers participate, exchange, collaborate and rely on their social networks and social media, companies have an extraordinary opportunity to innovate and incorporate these developments into their PEER strategies. Rather than viewing social as an addition to PEER, we prefer to view it as an integral component of each of the elements – Personalizing, Enabling, Enhancing and Rewarding.



Mobile and Loyalty – Current State and Outlook

Businesses large and small are in the early stages of transitioning from a narrow view of Loyalty as “spend and get” programs to a broader conception that recognizes the critical role of mobile and other technologies in PEER – Personalizing, Enabling, Enhancing and Rewarding consumers. The “spider chart” below shows our assessment of the current state of mobile and loyalty – dots closer to the outside of the web (e.g., curator, rewards) reflect strategies that are more widely deployed, while those near the center (e.g., confidant, broker and valet) reflect strategies in their infancy.



Within Personalization, companies have focused attention primarily on Trail strategies and to some extent Glimpse strategies – other than Google, few companies are close to achieving the role of Confidant. Among Enabling and Enhancing strategies, significant opportunities exist for brands and retailers to leverage mobile and serve as Curator, Guide, and Concierge. Companion strategies are also viable in many categories. Loyalty programs have also focused on points, cash back, and other rewards – as discussed above, mobile wallets and payment will bring sweeping changes to these programs. Given the synergies between social, mobile and loyalty, companies should also borrow concepts from gamification and behavioral economics and invest more heavily in Recognition and Club strategies. Finally, as [AI for mobile](#) advances beyond Siri and Google Now, innovative companies have a unique opportunity to deliver on the promise of Broker and even Valet strategies.

Conclusion

The table below summarizes how companies can use PEER strategies to deliver on the key drivers of Loyalty. Pursuing mobile and PEER strategies, retailers and brands in virtually every category can dramatically improve their business. Companies with the vision and ability to deliver will reap the benefits – unmatched loyalty and a growing number of customers who profess their “[brand love](#).”

How Mobile + PEER Strategies Boost Loyalty								
immr	Competent	Reliable	Trustworthy	Rewarding	Transparent	Fair	Considerate	Compatible
 Curator	✓				✓		✓	
 Guide	✓	✓	✓			✓		✓
 Concierge	✓		✓				✓	✓
 Companion				✓				✓
 Broker	✓		✓	✓		✓		
 Valet	✓						✓	✓
 Rewards				✓			✓	
 Recognition				✓	✓		✓	✓
 Club				✓			✓	
 Trail	✓							✓
 Glimpse		✓	✓	✓	✓		✓	✓
 Confidante		✓	✓	✓	✓		✓	✓

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About the Author



Dr. Phil Hendrix is the founder and director of [immr](#), a research and advisory firm focused on market opportunities afforded by new technologies, and an analyst with [GigaOm Pro](#). He specializes in helping organizations evaluate and capitalize on opportunities that are new-to-customers and new-to-market. Dr. Hendrix has extensive experience uncovering customer needs, identifying triggers and hurdles to adoption, and developing strategies that unlock market opportunities, both B2C and B2B.

As an analyst, Phil focuses on mobile innovation and the implications for companies across industries. He is a regular contributor at leading industry conferences, including the [World Summit Awards](#) (Abu Dhabi), GigaOm's [Mobilize](#) and [Structure:Data, ad:tech](#), [iMedia Summit](#), [Mobile-loco](#), Social-Loco, [Street Fight](#) (hyperlocal), and others. His current work focuses on technology and its impacts on consumer behavior, especially shopping, M-commerce and mobile payment.

As a consultant and advisor, Phil has led significant engagements with numerous startups (GeoIQ; m-ize.com; Company.com) and multiple business units of Fortune 100 clients in mobile and consumer electronics (AT&T, Verizon, Sprint, Sony Ericsson, HP, Barnes & Noble and others), financial services (American Express, MasterCard), transportation (Delta Airlines, UPS), insurance (Allstate, United Healthcare), healthcare (U.S. Oncology, Meridian Healthcare), and others.

Dr. Hendrix works closely with senior management and project teams on key issues, including market sizing, segmentation, positioning, and branding as well as innovation, user experience, and customer retention. Over the course of his career, Phil has helped clients conceive and successfully launch products, services and businesses in existing and new markets.

Before founding immr, Phil was a partner with [DiamondCluster](#) (strategy and technology consultancy), founder and head of IMS (Integrated Measurement Systems), and a principal with Mercer Management Consulting (now [Oliver Wyman](#)). He has held faculty positions at Emory University and the University of Michigan, where he taught courses in marketing, research, and buyer behavior for MBAs and executives. While at Michigan Dr. Hendrix also held a joint appointment as a research scientist in the Survey Research Center, Institute for Social Research.

Additional information on immr perspectives and reports prepared by Dr. Hendrix is available at [immr](#) and [Slideshare](#), with additional information available at [GigaOm Pro](#).



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IHG franchises, leases, manages or owns over 4,600 hotels and more than 675,000 guest rooms in nearly 100 countries and territories. With more than 1,000 hotels in its development pipeline, IHG expects to recruit around 90,000 people into additional roles across its estate over the next few years.

Key Ring

Mobestream Media is the maker of the Key Ring Reward Cards (Key Ring) mobile application available for all iPhone, Android, Windows Phone 7 and Blackberry devices. Key Ring's millions of users download the app to scan and store existing loyalty cards, join new programs, and receive mobile coupons via their smartphones. The popularity of the app resulted in it being voted 1st place in Mobile Commerce and Best Online Pick for the 2011 Cellular Telecommunications Industry Association (CTIA) Emerging Technology Awards. In addition, Key Ring has been featured by many news publications such as USA Today, New York Times, LA Times, Lifehacker, Mashable, Time Magazine Techland, Entrepreneur Magazine, and several others.

Mobestream works with retailers to create new programs or extend the capabilities of their existing programs through mobile enrollment and digital offers. Key Ring Business, a loyalty platform, helps companies attract, retain, and reward valuable customers. Mobestream Media was acquired by Gannett in September 2012. The company operates as a standalone business unit under the Gannett Digital Marketing Services (GDMS) organization.

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