

# Next Generation Mail : Toward a Personal Social CRM

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Nicolas Guillaume

QuestionableMail

Paris, France

e-mail: nicolas.guillaume@questionablemail.com

**Abstract**—Email remains the number one communication and personal relationships management tool. Its use has changed little and its related problems (overloading) remain basically the same.

New email add-on startups have shown the potential of a more intensive use of email's data (the "implicit social network" embedded into email) and especially a "social" approach based on contacts rather than messages. This leads to define the "Personal Social CRM" as the next evolution of email :

- Convergence with feeds management tools (filtering of an overloaded flow)
- Relationship Management with comprehensive and proactive views than message flow views
- Delegation Management to access, share and exchange email's relationship within a group or with Enterprise CRM processes.

*Keywords-component; email, Personal Social CRM, implicit social network, contact, relationship, delegation*

## FIRST TOOL OF COMMUNICATION AND PERSONAL RELATIONSHIPS

Email is the communication tool the most widespread and used in the world despite the development of alternative communication channels (instant messaging, social network direct messaging). It has the broadest and richest data about its user's relationships :

- Uses data and not only declarative data, as in professional social networks (ex : LinkedIn, Viadeo)
- Explicit data but also implicit data through the social graph of people and elements involved in relationships (an "implicit social network"). On the potential of these data and social graphs implied see:[1], [2], [3].

Email is the essential tool of the professional activity and is often seen as a critical business application. Time spent using email is often high ("email overload") despite the development of collaborative applications to unload email from elements and activities (shared documents and works, calendar and planning, group and tasks management,...). Collaborative solutions can have a substitutive effect on

email but cannot cover the whole span of all email's activities such as :

- Personal and group exchanges
  - o Interpersonal conversation ("thread")
  - o Group information ("copy" mailing list)
  - o Tasks and activities management
  - o Documents, files, photos, links, etc sharing
  - o Meeting organization
  - o Reminder and sync
- Repository of external interactions :
  - o Notifications (events, requests for action,...) and feeds (Facebook, Twitter, Blog, Foursquare,...). Email is the universal notification system for web applications both for mass market application and business workflow application
  - o Information (newsletter, mailing, ..)
  - o Confirmation of registration, payment, controlling, monitoring, billing, ...[4]

Email is also the relationship repository with the most comprehensive view of :

- Contact lifecycle :
  - o Initial contact
  - o Appointments, meetings
  - o Minutes of meetings, confirmation of action
  - o Exchange of information (documents, ...)
  - o Status of the relationship (frequency, length, regularity,...)
- Elements associated with the relationship :
  - o Groups of people
  - o Organizations
  - o Subjects
  - o Documents

## EMAIL USE

The use of email has changed little in time and its related problems (overloading) remain basically the same. Email continues to grow very significantly in volume (even filtered from spam and even with the substitution to instant messaging and direct messaging in social networks that occurs widely with the younger generations). This growth has generated a workload and a cognitive load for email's users ("email overload").

Nevertheless, users have adapted their behaviors and this point has not reached a "strategic" level in the Enterprise's agenda:

- The perceived importance of each unitary message has lowered. We have transitioned from "I reply to all emails as quickly as possible" to "if you don't remind me, I cannot answer to your email".
- Emails flow processing methods have changed. We have transitioned from "I treat all emails and I delete or archive them" (better adapted for low volume) to "I will only read important emails. The others I'll see later (or not). I erase nothing and store everything" (better adapted for large volume)
- This was popularized in the "Getting Things Done" (GTD) method used by some personal productivity applications focused on email filtering and messages prioritization.
- It has also been internalized into managerial behaviors "I do not know how to increase the productivity of intellectual activities, so I increase the volume of the workflow and added value activities will be "naturally" prioritized by employees and others abandoned".

This "resilience" of the organization to any increase of emails volume has led to:

- A low development of applications focused on filtering and prioritization of the messages flow (ex : Kwaga, OtherInbox, ClearContext, Liaise, EmailTray, Nubla, Waiting , etc)
- A focus on collaborative applications (document sharing, group information sharing, enterprise social network) in order to "unload" email and promote a more open collaboration (compared to closed personal collaboration with email).
  - o Collaboration applications do not replace email. They rather improve some of its use cases with "pains" strongly felt by enterprises (information locked, information retrieval uneasy, no traceability, lack of compliance, etc)
  - o The full replacement of email by collaborative applications integrating a corporate social network, as claimed by Atos [5], seems to be too ambitious at this stage, especially because of missing a "universal" interoperability protocol between all inhomogeneous applications in inhomogeneous organizations as could pretend Google Wave Federation Protocol [6], [7].
- Commodization of filtering functionalities by major messaging providers :
  - o "Priority inbox" in Gmail after the "thread" display mode
  - o "Social Outlook Connector" in Outlook and "People widget" in Gmail to provide richer

information about contacts with email and communication history

- o Productivity features (importance flag, tags, monitoring indicators, filtering and classification automatic rules, etc).

#### STARTUPS INNOVATION

Some startups have turned "social" email with a "contacts" focus rather than "messages" :

- Xobni
- ETAC (acquired by Salesforce)
- Gist (acquired by Blackberry)
- Raportive

They tend to transform email into a real "Social Personal CRM" not only to process incoming flow but also to manage all individual relationship. And not only limited to messages but extended to all other communication channels (Facebook, Twitter, LinkedIn, etc).

These startups have reach visibility and a wide users base demonstrating users' needs for such social functionalities.

Email mobility (Xobni, Gist) and Social sharing (Grexit)

#### KEY POINTS FOR EMAIL FUTURE

Moving the view from messages to contacts is the first point to define the "Social Personal CRM" as the future of email. A message is not important alone but must be analyzed in a conversation thread and with all the history of related communications with the same contact. Individual and his relationship history is the best criteria for communication prioritization.

Integration of other personal data related to contacts (Linkedin, Viadeo, ...) and other communication streams (Facebook, Twitter, Quora, etc and also Linkedin) enhances this approach.

There is convergence in the flow filtering approach with feeds management tools such as Seemic or TweetDeck. Which is quite normal because they face the same "flow overload" problem. It is easy to grow its number of Facebook's friends or Twitter's "followers" and flow volume can quickly explodes.

Feeds management is nevertheless specific with :

- "Openness" of conversations (community extended to the friends of friends, free registration of "follower", search in the whole feeds)
- Gradual steps of "social engagement": message communication is on top before less engaging steps as follow feeds, "poke", "like" or comment in a "public" discussion. All these participate of the socialization phase not managed by the email (you are supposed to know your recipient before sending him email).
- "Mass" orientation (vs personal) related to the public or semi-public nature of the feeds. It is possible to track

feeds at a personal, group, community or enterprise level. It is a marketing opportunity for companies to develop a "Social" CRM – not personal- (to listen and participate to conversations with all of their customers and prospects). It is the same mass industrialization logic as CRM campaign management but with a personal interaction on one side.

The relationship management is the following of the refocus on contact. The goal is not just to manage the flow of messages but to be comprehensive and proactive on this flow :

- Initiate and maintain contacts
- Expand its network according to predefined guidelines or opportunities
- Keep track of contacts and to adapt the rules and communication actions that are applied

This is the work of a good (real) assistant: remember who should be contacted, how to take advantage of opportunities for communication, to list people to send greetings, etc.. This relationship management is more and more important because it has become an expected part of many jobs (required but let at personal initiative).

A last point is the notion of delegation. It comes from two observations:

- In a company, internal contacts driven by employees, are the richest source of contacts but they are also difficult to use because employees do not have means for collecting and making available them (only 16% of French companies use their internal contacts for marketing campaigns) [8]
- Because of the density of human relationships, contacts that are relevant to a specific search can often be found at a very low social distance in a close group. But today there is no way other than free discussion at the coffee machine, to find them. This is a consequence of the combination of the theory of 6 degrees (we are no more far from 6 degrees of relationship of all people in the world according to Milgram[9]) and weak ties (people tied with weak links to us tend to "filter" information better than those with which have had strong ties by Granovetter [10]).

Altares (D & B) has conducted an experiment of collecting, filtering and sharing Outlook contacts of its employees within the company that has produced very good results to identify highly qualified contacts.

The conclusion is clear : we must share contacts! But it is easier to say than to do because it is not possible today :

- To share email contacts with other people
- To delegate email contacts with a CRM tool.

The "owner" of a contact is usually careful not to expose it to a not suitable contact and want to be informed to all new contact. What is missing is a control of all use of contacts with notification and approval (unitarily or

according to rules). This kind of "permission marketing" mechanism already exists with OAuth, the authorization protocol used by Facebook to give, revoke or modify access rights to data provided to Facebook applications. But no one similar mechanism was implemented into email application. The share of contacts is also beneficial to users because it allows them to better leverage resources and actions of the Enterprise CRM processes. For example, communication actions or marketing events with a feedback to the "owner" of the contact (the contact was invited and participated in this event or not ...).

Raportive, a startup focused on the enhanced contact management is a good example of this point with a view "What do my apps say?" (about contact) and integration with a number of Enterprise applications such as email marketing, Collaboration, Social CRM and more.

## CONCLUSION

Email has shown very few evolution for a very long time but the current context brings new evolution points.

We believe these trends (focus on contact, hybridization with feed management tools, predictive and pro-active relationship management and integration with CRM tools) will transform email into a Social Personal CRM.

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