

Next Generation Mail : Toward a Personal Social CRM

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Abstract— The email remains the central tool of communication and personal relationships. The use of email has changed little. The problems related to the mail are only very partially addressed but domain's startups have shown the potential of a more intensive use of email's data and especially in a "social" approach centered on contacts rather than messages.

This leads to define the "Personal Social CRM" as the evolution of email :

- With a first level of convergence with Feeds management tools
- With a more predictive and proactive relationship management
- And the use of "Authorization Management" to promote contact sharing and integration into CRM processes.

Keywords-component; mail, Personal Social CRM, Contact, Relationship Management, Delegation

FIRST TOOL OF COMMUNICATION AND PERSONAL RELATIONSHIPS

The mail is the communication tool the most widespread and used in the world despite the development of alternative channels of communication (instant messaging, Facebook direct message).

It has the broadest and richest data about relationship of its user.

- Usage data and not only declarative data, as in professional social networks (Linkedin, Viadeo)
- Explicit data but also implicit data through the social graph of people integrated in relationships and semantic data between them through the terms used and attached elements. On the potential of these data and social graphs implied see: [1], [2], [3]

Mail is an essential tool of the professional activity. It is now often seen as a critical business application. The time spent using it is often high (hence the "email overload") despite the development of collaborative applications to

unload email (shared documents, calendar, tasks, schedules).

It is an universal tool with multiple uses:

- Sending and Receiving:
 - Interpersonal Conversation (email "thread")
 - Group Information ("copy" mailing list)
 - Tasks and activities Management
 - Documents, files, photos, links, etc sharing
 - Meeting organisation ("Meeting Request")
 - Reminder and sync (sending email to yourself)
- Reception:
 - Notifications (events, requests for action, ...) and feeds (Facebook, Twitter Direct Message, Blog, Foursquare, ...). Email is the universal notification system for web applications both for mass market application and business workflow application
 - Information (newsletter, mailing, ..)
 - Confirmation of registration, payment, controlling, monitoring, Billing, ... [4]

The mail is also a fundamental relationship repository with the most comprehensive view of personal relations:

- In the contact lifecycle :
 - Initial contact
 - Appointments, confirmation of meeting
 - Minutes of meeting, confirmation of action
 - Exchange of information (documents, ...)
 - Monitoring of the relationship (resumed contact information, greetings, ...)
 - Update Status
- In all relationship associated with :
 - Same communications
 - Same firms
 - Same objects
 - Same contacts
 - ...

EMAIL USAGE

The use of email has changed little in time. The related problems are only very partially addressed. The mail has known a very large growth in volume (even filtered from spam and even with the substitution to instant messaging and direct mail in social networks that occurs widely among the younger generations). This growth has generated many “pathologies” described as “email overload” cognitive overload, stress Nevertheless users have adapted their behaviors and this topic have not reached a “strategic” level in the enterprises agenda:

- The perceived importance of each unit message have lowered. We went from “I reply to all emails as quickly as possible” to “if you don’t remind me, I cannot answer to your email”
- The emails processing method have changed. We went from “I treat all emails and I delete or archive them” (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” (adapted for large volume)
- This was formalized in the “Getting Things Done” (GTD) method used by some productivity applications centered 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 prioritizing the flow of messages (Kwaga, OtherInbox, ClearContext, Liaise, EmailTray, Nubla, Waiting ...)
- A focus on the development of collaborative applications (document sharing, scheduling, activities, ...) in order to “unload” the email and promote a more open collaboration (compared to closed copy groups with email).
 - The goal is not to replace or transform the email, it is only to improve some use cases with “pains” strongly felt by the company (information locked, hard to find information, no traceability, lack of compliance, ...)
 - The total replacement of the email by collaborative applications integrating a corporate social network, as experimented by Atos [5], seems to be too ambitious at this stage because of missing a

“universal” interoperability protocol such as Google Wave Federation Protocol [6], [7].

- The integration of first level tools among email providers:
 - “Priority inbox” in Gmail after the “thread” display mode
 - “Social Outlook Connector” in Outlook to provide richer information about contacts with email and communication history (this feature is directly inspired by Xobni that Microsoft tried to buy).
 - Productivity features of the email, variously adopted by users: indicators of importance, tag, indicators for monitoring, filtering and classification automatic rules. ..

STARTUPS INNOVATION

Some startups are, instead, focused on the “social” and “relational” side of the email based on contacts rather on messages, such as :

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

They tend to transform the email into a real “Social Personal CRM” not only to operate but also to manage all individual communications. And with a perspective of integration of all other communication channels (Facebook, Twitter, LinkedIn, ...) into a unifying tool of communication.

The new use cases of email on mobile and social sharing of some of its elements are also emerging fields for startups. These startups have shown some market traction on the issue, at least because they have been bought or copied by major players (Xobni by Microsoft). They demonstrated a first round of adoption by users showing that there are “pains” felt by users. They must now expand this need to a wider users base.

At this stage, they face a specific adoption problem with the email because of its ease of use :

- Users expect the same level of ease of use of any new application
- Users can always come back to traditional email use cases, less productive but easy to perform.

KEY POINTS FOR EMAIL FUTURE

The “Personal Social CRM”, already mentioned, seems to be key to future developments of the email. First in moving the center of gravity of the mail from messages to contacts. A message is not important alone but must be appreciated in a conversation thread and with all the

history of related communications.

Integration of other data on the situation of the individual (Linkedin, Viadeo, ...) and other communication stream (Facebook, Twitter, Quora ...) enriches and supports this approach because the individual and his relationship history is the best criteria for prioritization.

There are a convergence or a complementarity with management feeds tools (Facebook, Twitter, ...) such as Seemic or TweetDeck. Which is quite normal because it is easy to grow its number of Facebook friends or "followers" on Twitter and it can quickly generate a very large volume of feeds with prioritizing and filtering become crucial (same problem as in the "mail overload").

These management feeds tools bring a new approach to filtering:

- From the "openness" of conversations (community extended to the friends of friends, free registration of "follower", direct search, display of "trend" keywords across the social feeds).
- By a more gradual scale of "social engagement": we are not forced to communicate with someone directly as with the mail. We can first follow the feeds, "poke", "like" or recommend his conversations or have a "public" discussion "with him. This facilitates the socialization phase not managed by the mail.
- The level of engagement is nevertheless not directly integrated and managed into tools, excepted at a very basical level by group (Facebook group, Twitter list,...)
- A key point is the "mass" orientation (vs personal) of these tools 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). We are in the same mass industrialization logic as campaign management but with a personal interaction on the other side.

The relationship management is the logical consequence of the refocusing on contact. The goal is not just to manage the flow of messages but to be predictive 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

The equivalent of do (did) a good assistant: remember who should be contacted, how take advantage of opportunities for communication or meeting, list of people to whom send greetings ...

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 third key point is the notion of delegation.

It comes from two observations:

- In a company, the internal contacts made by employees, are the richest source of contacts but they are also more difficult to use because employees do not have a tool 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 in a close group to a very low social distance. But today there is no way other than the coffee machine, to find them. This is a consequence of the combination of the theory of 6 degrees (we're far apart as 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, reprocessing by a campaign management tool and shared 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 his contacts! It is easier to say than to do because it is not possible today :

- To share his email contacts with other people
- To delegate the management of his email contacts with a CRM tool.

The "owner" of the contact is usually careful not to expose it to not suitable contact and want to be informed to all new contact. A use control of data contact with notification and approval (unitarily or according to rules) is necessary, as a form of "permission marketing". This type of 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 not 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 Firm level CRM business 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 CRM tools :

- MailChimp
Powerful e-mail marketing. Instantly see your members' ratings, opens and clicks.

- Bantam Live
Team Workspace With Contact Management, CRM, and Social Network Integration.
- BatchBook
Social CRM, contact management and social media monitoring all in one.
- BookingBug
In a business bookings Which marriages? Improve your workflow now: manage bookings Within your email
- Brightpearl
Accounting and CRM for Small Business. Manage your Customers Directly inside Rapportive.
- CrunchBase
Essential For Every contractor and intelligence Investo

CONCLUSION

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

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

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