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Eight Steps to Successfully Integrate VR-XR-AR into Your CRM Efforts



Many of the world's leading companies are currently using virtual reality, mixed reality, and augmented reality (VR-XR-AR) to achieve impressive sales, marketing, and customer service results. In my [June 2021 column](#), I described why VR-XR-AR technology is a game changer for sales, marketing and customer service. In October 2021, my colleague Tim Bjarin from [Creative Strategies](#) and I facilitated a [webinar](#) showing videos of how eight companies are successfully integrating VR-XR-AR into sales, marketing, and customer service. To be successful in your VR-XR-AR efforts, here are the eight steps you will want to follow.

Step No. 1: Prepare Your VR-XR-AR Executive Vision

It is critical to gain the support of the executive team, which will ultimately drive the company's VR-XR-AR strategy and implementation. Given that VR-XR-AR technology is new to many executives, this step typically has a heavy educational component. Many companies start with a facilitated VR-XR-AR executive briefing, during which executives learn about the VR-XR-AR marketplace, why VR-

XR-AR is important to their business, the “art of the possible” when it comes to how VR-XR-AR can be applied to their business, and VR-XR-AR trends over the next three to five years. The executive briefing typically ends with the creation of your VR-XR-AR executive vision.

Step No. 2: Determine Your “Burning” Business Issues

“Burning” business issues are issues that impact your ability to sell, market, and perform customer service. In customer service, for example, a company’s burning business issues may include “We need to reduce the learning gap between new and senior customer service reps by enabling real-time knowledge transfer”; or “We need to provide remote diagnosis and repair while minimizing travel costs and without requiring skilled technicians to be onsite.”

Step No. 3: Recognize Core Business Processes that VR-XR-AR Technology Will Enhance

These technologies can have an impact on various parts of your business. Here are some sales process examples: enhance your sales process by integrating VR-XR-AR technology into your product/service offering so customers can virtually try-on your product (e.g., Warby Parker’s Virtual Try-On App); help customers configure a new piece of machinery on the factory floor (e.g., Microsoft AR Layout tool); permit customers to wear a VR headset and “travel” to their vacation destination (e.g., Virgin Holidays).

Step No. 4: Identify VR-XR-AR Technology Opportunities

Once you have identified your burning business issues and prioritized the core business processes that VR-XR-AR will support, you are ready to identify appropriate VR-XR-AR technology to integrate into your sales, marketing, and customer service efforts. Given the lightning speed at which VR-XR-AR technology is evolving, consider seeking advice from industry experts to identify the most appropriate tool for your specific needs.

Step No. 5: Determine Key VR-XR-AR People Issues

You will need to put into place a robust organizational readiness program—including effective training, communications, rewards/incentives—to successfully implement your VR-XR-AR program. Your readiness program must include both internal personnel and external customers, who will be active participants in your VR-XR-AR efforts.

Step No. 6: Create Your VR-XR-AR Strategy

In support of your executive vision, and using the outcomes from Steps 2 through 5, your VR-XR-AR strategy will explain how you will integrate VR-XR-AR technology into your products/services, which customer segments you will target, and over what time frame the rollout will happen. It describes how you will apply VR-XR-AR technology to make it easier for customers to do business with you, help create the positive experiences digital customers expect, drive new customer sales, and lower customer support costs.

Step No. 7: Develop Your Three-Year VR-XR-AR Road Map

This road map includes people, process, and technology “streams,” identifies activities in each stream, describes dependencies between activities, and includes your approach to monitoring road map activities. Consider using agile methodology—breaking the project into phases in which team members continuously undertake a process of planning, executing, and evaluating—to successfully implement your VR-XR-AR road map.

Step No. 8: Prepare Your 5-Year VR-XR-AR Business Case

Many companies create a business case or business justification document to approve their VR-XR-AR program investment. Your VR-XR-AR business case contains all costs for people, process, and technology expenses, revenue forecasts resulting from this investment, and break-even analysis and ROI metrics.

VR-XR-AR will be the most disruptive technology over the next decade. Worldwide spending is forecasted to skyrocket from \$12 billion in 2020 to \$1.5 trillion in 2030. Are your competitors already using VR-XR-AR to achieve impressive sales, marketing, and customer service results? To learn more, visit the [VR-XR-AR Resource Center for Enterprise](#) that Tim Bajarin and I created to highlight use cases and the latest VR-XR-AR technology. While VR-XR-AR technology is nascent, venture capital is already investing billions in this area (as evidence, look no further than the 11-minute summary of Mark Zuckerberg’s [Metaverse announcement](#)). If your company is going to be around in 2030, you need to catch this wave now. Take the time to get these eight steps right.

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