Customer Relationship Management (CRM)

Software Evaluation Guide

A Guide to Talking with Your Company about CRM

Introduction

Customer relationship management (CRM) provides the tools and capabilities needed to create and easily maintain a clear picture of customers, from first contact through to purchase and post-sales. Generally there are modules for sales, marketing, and customer service. CRM products are designed to deliver fast, flexible, and affordable solutions that assist:

- in driving consistent, measurable improvements in every business process,
- enabling closer relationships with customers and
- helping to achieve new levels of profitability.

Even for companies with the most complex of sales processes, CRM should provide easy-to-use features and capabilities to help improve the way sales and marketing organizations target new customers, manage marketing campaigns, and drive sales activities. CRM should also help your employees make better business decisions and get a clearer view of your customers.

The CRM Software Evaluation Guide consists of six sections:

1. Talking to your CFO
2. Talking to your Customer Service Manager
3. Talking to your IT Manager
4. Talking to your Sales Manager
5. Talking to your Marketing Manager
6. Talking to your Service Manager

Each section is designed for you to use as a guide when determining the evaluation criteria for key areas of your business.

Part I

Talking CRM with the CFO

To ensure that finance meets their objectives, your CFO needs information about issues like total cost of ownership (TCO) and return on investment (ROI). Here's how you can your CFO and get the information you need to make fiscally sound decisions.

Your CFO's CRM priority: fiscal fitness

Your CFO, who is responsible for the fiscal well being of your organization, evaluates investments with the following concerns in mind:

- Increase shareholder value and expand the company's revenue opportunities
- Help manage the company's operational strengths and weaknesses
- Ensure CRM introduces efficiencies into the organization through the automation of many common sales and service activities
- Identify and expand new and existing opportunities
- Make sure that investments in technology are necessary and that the technology gets used
- Ensure that the goals for a new system deployment are clear, and improvements are measurable
- Establish a reasonable timeframe for increases in productivity and returns on investment
- Measure the success of a CRM implementation

Questions for the CFO

Your CFO can deliver the specifics of protecting corporate assets:

- How will a CRM investment increase productivity and scalability to help the company grow?
- How will the investment support the overall business strategy?
- Which compliance issues will impact our data assets?
- What second-tier costs can we expect from deploying a comprehensive software solution?
- What are the short- and long-term economic returns of CRM?

Conclusion

Your CFO has the fiscal know-how that can help you accurately evaluate how a CRM solution fits your needs and benefits your organization. The talking points in this article can help you get the evaluation data you need to make a sound technology investment. Get your team together and begin building more profitable customer relationships. The right CRM solution can sharpen your competitive edge and transform the way your business succeeds.

Part II

Talking CRM with your Customer Service Manager

Today competitive advantage increasingly depends on how organizations manage their customer relationships—and not simply on how well they design and build their products. Companies must implement strategies that enable them to be more customer-centric in a world where customer expectations will continue to escalate.

This guide can help you to plan discussions with your customer service manager to make informed decisions about how you can implement business processes to meet customer expectations.

Your customer service manager's CRM priority: customer care

The customer service manager, who is responsible for cultivating advantageous customer relationships, considers the following when evaluating new systems:

- Providing the customer service team with tools for making informed decisions

- Creating cross selling and up selling opportunities

- Keeping customer care at the center of business

- Integrating new solutions with existing data systems

- Measuring service performance

Questions for the customer service manager

Your customer service manager has know-how for maintaining service efficiency and customer satisfaction:

- What are the current barriers to good customer service that CRM technology might alleviate?

- How much training do you foresee your team needing, and what suggestions can you make for accommodating training?

- What does current survey data on customer satisfaction imply about our need for new tools?

- What information do service representatives have difficulty or delays in accessing?

- What is the company organized around? Customers, product, or service?

- How can we make doing business with us easier for our customers?

Conclusion

Your customer service manager knows that customers are at the center of your CRM selection process and that technology solutions should accommodate customer service instead of customer service bending to fit the technology. The talking points in this article can help you get the information you need to keep your CRM decisions service-focused. The right CRM solution doesn't just make your life easier—it helps you succeed because it simplifies doing business with you.

Part III

Talking CRM with your IT Manager

When evaluating the technical implications of CRM deployment, remember that CRM is foremost a technology that can help propel your business, instead of a tool that dictates your business processes. Discuss with your IT manager the business value of CRM, and get vital input on the technical corollaries of CRM implementation. The IT manager is your partner in ensuring that your CRM solution is up and running so it can support the business strategy as you planned.

Talking tactics: Your IT manager's concerns about CRM

The IT manager keeps your organization's information technologies running smoothly 24/7, and considers the following when evaluating new systems:

- Wants technology that involve minimal interruption in your employees' work

- Looks for systems that are easy to setup and maintain while offering high availability and performance

- Avoids deploying untried technology

- Seeks scalable solutions that easily grow with the business

- Wants technology that is highly secure and easy to restore after an adverse event

- Looks for new solutions that take full advantage of existing IT resources as well as other company investments

- Wants new technology that synchronizes and integrates well other applications, data sources, and systems.

Questions for the IT manager

Your IT manager can detail the essential technical considerations of a CRM implementation:

- What proof do we have that the CRM system will enhance infrastructure?

- What kind of deployment downtime can be expected?

- How can a CRM system keep IT aligned with business goals?

- What kinds of facts and referrals can assure product benefits and quality?

- What are our data backup policies, and how do we ensure CRM data is protected?

- What type of technical support is need after implementing CRM?

Conclusion

Your IT manager supports business goals by keeping the enterprise running, and by implementing tools that allow the company to pursue new opportunities and protect customer relationships. This guide will help you get the IT perspective on CRM so you can make a technology investment that will reinforce your competitive edge.

Part IV

Talking CRM with your Sales Manager

To ensure that sales representatives meet their objectives, your sales manager continually needs information from them about leads and active prospects. Here's how you can work with your sales manager to find out how CRM can best support sales goals.

Your sales manager's CRM priority: pursuing revenue

The sales manager is focused on moving your product and targets the following CRM evaluation issues:

- Supporting sales staff's efforts to secure business

- Avoiding the disruption of a complete systems replacement

- Obtaining personalized vendor support for new systems

- Providing the data necessary to support sales goals

- Integrating new solutions with existing data systems

- Tracking leads with minimal data entry and paperwork

- Helping sales force accept and adopt new CRM processes

Questions for your sales manager

Get the details you need on how CRM can support revenue-generating activities:

- What kinds of sales history and forecasting data are now available?

- What kinds of new CRM tools would help the team sell?

- How much training do you foresee your team needing?

- How are we currently tracking the competition?

Conclusion

The sales manager is your best ally for initiating a CRM project. Champion the CRM selection process with sales input to gain compliance when the sales division uses the new tools. Investing in the right CRM solution supports your sales team's best practices, resulting in the optimal outcome: closing more deals.

Part V

Talking CRM with your Marketing Manager

To effectively design compelling marketing campaigns that present new products and services to customers and new prospects, your marketing manager needs powerful, easy-to-use tools with which to analyze your customer and lead base. He or she then needs a way to quickly and easily pull together targeted lists, launch campaigns, track results, perform follow-up, and pass responses to the most suitable sales people.

Your marketing manager's CRM priority: Increasing awareness

The marketing manager wants easier, less expensive ways to help your company sell the right products and services to the right people at the right time. To do this, he or she needs to:

- Know which products and services your customers are using and your leads are pursuing.

- Easily segment customers and leads.

- Quickly create new lead lists.

- Send personalized e-mail messages to groups of leads or customers.

- Track which customers have been targeted with past marketing campaigns.

- Quantify new sales associated with various lead sources and marketing activities.

- Monitor the progress, cost, and success of marketing campaigns.

Questions for your marketing manager

- How do you manage lead lists today? How would you like to manage them?

- How much work is involved in identifying target customers and prospects for marketing campaigns?

- How do you track marketing campaigns?

- How do you judge whether a marketing campaign has been successful?

- Do you know how much revenue a campaign generates?

- How do you compare the success of multiple campaigns?

- How are new leads distributed to sales?

Conclusion

Your marketing staff has probably been underserved by sales automation or CRM solutions you may be using now. A CRM solution with built-in marketing capabilities can dramatically enhance your marketing staff's ability to reach leads promptly with compelling messages—and up-sell existing customers through new offers.

Part IV

Talking CRM with your Service Manager

If your organization has to schedule resources of any kind—people, equipment, vehicles, buildings, and so forth—it's a daily chore of your service manager to make sure these limited resources are used to best effect and that customer needs are met promptly. When this dispatching function is performed on paper by multiple people, mistakes that hurt customer service are virtually unavoidable.

Your service manager's CRM priority: Centralized, intelligent scheduling

The service manager is focused on quickly and cost-effectively delivering services to customers and wants a system that can:

- Show at a glance the availability of every service resource companywide.
- Allow centralized service scheduling.
- Give multiple people access to the scheduling resource from any location.
- Intelligently apply your business rules to service scheduling (for example, "Bob and Sally are our only X-widget experts").
- Monitor the use of resources.
- Generate a history of which customers have received which services at which times.
- Automatically record service requests (both open and closed) associated with specific customer records.

Questions for your service manager

- Who schedules service appointments today?
- How is it done? How do you wish it could be done?
- How does your scheduler know which resources can deliver a service and when they are available?
- Are the dispatchers a bottleneck in scheduling service for customers?
- What are your most common customer complaints relating to service scheduling?
- What kind of reporting do you need on your service team and on the services you're delivering?

Conclusion

Scheduling services promptly and following through with excellent service when promised can go a long way toward enhancing customer relationships. A CRM solution with built-in service scheduling capabilities that work the way your business works can improve customer service and lower your service costs.

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