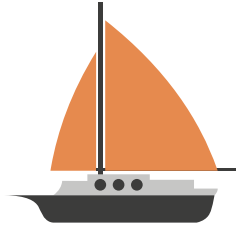


# How to set it up

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by commusoft 



# Get everyone on-board, from the start

It is critically important that everyone on the team should understand why you are looking to build a database. Do this in person. Call a team meeting at a time that suits everybody and run through the benefits listed in the first chapter, emphasising those that are most relevant to your business. It is best if you can highlight the fact that a customer database is essential to take your company to the next level. Your employees will feel reassured that it is the right thing to do, and that it will not only help secure their jobs but potentially provide more interesting opportunities.

Do not be put off by the fact that some people – and this may include your most committed and positive members of staff – will raise doubts. That is normal, change can be scary. Prepare yourself for the questions that will be raised. You will find answers to the questions typically asked in this eBook.

You should also have one-to-one meetings with those who will be most affected. For example, that is likely to be the person(s) who handle most or all of the admin work and promoting the company. They will need to work closely with the person or team who will set up the customer database with you and it is essential that they should give their full cooperation. In order to secure that cooperation, you should highlight not only the benefits to the company, but the direct personal benefits, such as a reduction in the more boring and monotonous activities, freeing up time to do more interesting tasks such as promoting the company, and the ability to interact better with customers.




# Make it a **shared** decision

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A project like this is more likely to succeed if people feel they have a stake in its success. You will need to select a partner to supply the customer database software and get it set up in your company.

Draw up a shortlist of potential partners and involve the key individuals in your company in the interview and selection process. Identify the partner who scores highest in terms of the product and the service they offer, their understanding of your business, and their personal chemistry with your team. Encourage your team members to express their opinions on each of the candidate partners.

You may not be in full agreement with each other, but if the selection process is open and transparent, the implementation project is much more likely to proceed smoothly.





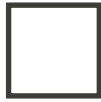
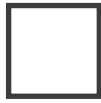
# Establish **clear** selection criteria

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Cost is obviously an important issue when it comes to implementing a system but you need to define cost in broad terms. It is often a mistake to base your decision on a simple comparison of the initial up-front costs. Moreover, software companies have different pricing models, often dependent on the way the system is set up: does it run in-house or over the cloud, is the licensing fee on a per-user basis etc. The term that is often used here is “total cost of ownership”. Ask yourself, what is it going to cost to run this system over the next five years?

Also, when considering costs, think about the cost savings that the system will bring, such as a reduction in admin overheads, as well as the cost of the system itself. That way you will see, at least in ballpark terms, the return on investment.





That said, cost is only one factor, and if your company has ambitions to expand, it is far from being the most important factor. You should be asking yourself rather, “What can this particular system add to my business, and how does it compare to the others on offer?” In answering that question, consider the following:

- + Which system is most (easily) adaptable to the way you do business?
- + Which system offers the features that are of most importance to me?
- + Do the candidate systems integrate with programs that we already have installed, such as accounting packages?
- + Which of the suppliers offers the best knowledge of my business, i.e. working with plumbing, gas, oil heating or electrical service companies?
- + Which of the systems on offer seems easiest to use? (In answering that question, consider all of the types of devices that will be used – typically desktop PCs in the head office and smartphones or tablets out in the field)
- + Who provides the best training?
- + Who provides the best post-implementation support?

The company that you select should be able to provide relevant references from past implementation projects and from its current customers. It might be a good idea to arrange a visit to a non-competitor company that has already installed the software and has been working with it for at least a year.

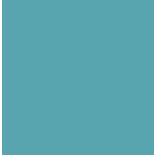


# Think **mobile!**

You have probably noticed – just about everything that used to be available on a computer – and more – is now available on mobile devices. This is a particularly exciting development for any company whose business is mainly conducted in the field, such as gas, plumbing and electrical service companies.

Yet even now customer databases and customer relationship management (CRM) systems are primarily designed from the point of view of the office worker or marketer to build “backend” data, rather than the service engineer who is often the one that makes the most use of this vital information at the “frontend” of the business. When service engineers, office staff, marketers and salespeople can all access correct information on a timely basis, stronger customer experiences happen – particularly in more complex, relationship-based interactions with high-value business customers.

**The bottom line is that you should make sure your information is easy to access for everyone who needs it, from their device of choice.**




# Create roles for the implementation and beyond

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Let us assume you have now decided on your software partner. Depending on the size of your company, you may want to involve more than one person in working on the implementation project, but ideally someone should be appointed as the Project Leader on your side.

This could be you personally, though if you are the Managing Director you will probably want to delegate. A typical implementation time would only be one or two weeks, but it is important that someone should be on hand with some time freed up from other duties during this period.






Once the system is installed and up and running, and your staff have received training (as applicable), you need to assign roles:

- + The system administrator – the person who is empowered to make changes to the system, assign other roles, and is generally responsible for the integrity of the data
- + The person who is responsible for ensuring that the data is backed up. Typically you would want to do a daily backup. This can be set up to be done automatically but you should have someone who at least checks that it happens as it should
- + Someone to cover for the above during their holidays
- + Manager (with access e.g. to personnel data)
- + User (admin)
- + User (engineer)

More sophisticated systems obviously support these different roles and allow you to assign the appropriate authorisations. When assigning these, make sure that everyone in your organisation has access to the information they need, so that effort is not wasted. It is incredibly useful for all members of the team to have access not just to the customer's name and contact details, but also to job history, service history and appliance information.

This could be the difference between engineers making the right or the wrong decision when leaving headquarters or when onsite. However, you will probably want to make some data, such as the profitability of an individual customer, visible only to yourself and one or two key members of staff.



# Master data and transactional data

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There are two basic types of data in a database.

Master data is the consistent and uniform set of identifiers and attributes describing customers and prospects (also suppliers and partners but for the purposes of this book we are focusing on customers). This includes names and addresses, telephone numbers, installed appliances etc. Of course, this information does change and can be added to, for example when a customer changes telephone number, but it is basically stable.

It is vitally important to have what IT professionals refer to as a unique (or universal) customer identifier (UCID), i.e. a reference number or code that is unique to each individual customer. This will ensure that you have an integrated view of customers across all of your operations (servicing, sales, marketing, invoicing etc.) The reference number or code should be included on all documents relating to the customer as this will significantly ease the admin burden. For example, if you ask your customers to quote the reference number when making a payment, this makes it much easier to reconcile paid invoices against bank statements and to identify late payers.





If you already have an accounts package, it is likely that you will first populate your customer database by importing its records (your software partner should do this for you). Thereafter you need to ensure that the two systems are consistent. For example, if a customer's telephone number changes, that change should be reflected in both systems. It probably makes most sense to keep the master customer record in the customer database and to use this to update changes in the accounting package.

Transactional data relates to events. The relationship between master data records and transactional data records is therefore "one-to-many". For each master data record you will build up a lot of transactional records over time: primarily things like service records and safety certificates but also interactions such as calls asking for advice or support.





# About the author

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Jason Morjaria is the founder of Commusoft.

Commusoft develops integrated software packages that meet the specific needs of plumbing, gas, heating, electrical and similar service companies.

The software covers customer databases, engineers' and office diary, estimates, job management, invoicing, certificates, service reminders, parts management etc. together with management reporting and integration to all widely used accounting software packages.

Based in London, UK, the company has 45 employees and 750 clients in the United Kingdom.

For more information visit **[www.commusoft.co.uk](http://www.commusoft.co.uk)**, phone 0203 0266 266 or just click below.

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