

Customer Relationship Management

Customer Centric - 360 Degree View

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CRM Systems

- ▶ Customer Relationship Management System
 - Everything companies use to manage customer relationships
 - Capturing information
 - Analyze information
 - Automates the Sales Process
 - Resource for Sales People
 - Solving problems for customers

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Customer Relationship Management

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CRM Systems

- ▶ Employees are reluctant to use
 - Takes time up front
 - Time that they feel could be better used for actual selling
 - Time to learn
 - Some sales people are Anti-technology
 - Changing systems
 - Have seen other systems come and go
 - Inferior systems
 - Many 'in house' solutions were inadequate

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Why use a CRM System – Sales

- ▶ Optimize Communication
 - Makes you look smart
 - Easy to communicate more often
 - Track what you do
 - All information connected in one place
 - Better organized
 - Happier Customers

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Why use a CRM System – Sales Manager

- ▶ Compare and optimize Sales Process
 - Closing levels
 - Compare sales people
 - Makes poor sales people better
 - Share info and processes
 - Focus on Higher Quality Prospects
 - Manage Potential Business

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**Why use a CRM System
– Management**

- ▶ Efficiency
- ▶ Lower cost
 - Efficient employees
 - Efficient marketing
- ▶ Analytics
- ▶ Avoid manual calculations (excel)
- ▶ Consistency between people
- ▶ Improves communication in the business
 - Department to department

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**Why use a CRM System
– Client Perspective**

- ▶ Better Experience for the Client
- ▶ Improves the Relationship
- ▶ Increase Sales
- ▶ Increase Customer Lifetime Value

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CRM – Front office vs. Back office

- ▶ Front office = customer interaction
- ▶ Back office = accounting, supply, inventory, etc
- ▶ Good CRM systems should have the ability to handle both
- ▶ Most companies focus on CRM for Front office

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CRM – Sub-Systems

- ▶ Six Sub-Systems CRM's handle
 - Marketing
 - Sales Process
 - Order Processing
 - Channels – Delivery
 - Customer Service and Satisfaction
 - E-Commerce
- ▶ Must record and monitor all client touches
- ▶ Monitor all analytics
- ▶ Provide Integration with other software

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Choosing a CRM system

- ▶ Primary Use by the organization
 - But also think of the future
- ▶ Choice of Systems
 - Self-Hosted (online solution)
 - Outside Hosted (Online Solution)
 - Self Contained on the Business computers
 - Self Contained on the Business Servers
- ▶ How it relates to the business processes
 - Industry specific solutions

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Choosing a CRM system

- ▶ Contact based vs. Account based
 - All entries are separate contacts
 - Accounts created and contacts under them
- ▶ What about other groups or one contact with multiple accounts.
- ▶ All in one solution vs. individual applications
- ▶ Open Source vs. Closed Source
 - Support
 - Applications community

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Choosing a CRM System

- ▶ Sales Process Management
- ▶ User Management
 - Privacy issues
 - Control issues
 - Linking clients to users
- ▶ Data Management
 - Backup and Security
 - Upgradable
 - Importing and Exporting Data

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CRM Benefits – Sales Department

IMMEDIATE BENEFITS

- ▶ Merging Marketing and Sales
- ▶ Increase sales effectiveness
- ▶ Customer retention and loyalty
- ▶ Merge new communications
- ▶ Campaign management
- ▶ Monitor and improve results
- ▶ Employee Management

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Many CRM Systems

- ▶ CRM Systems
 - SugarCRM
 - ZohoCRM
 - Info@Hand
 - Vtiger
 - Microsoft Dynamics
 - AmDocs
 - Salesforce.com
 - Act
 - Maximizer
 - IronWorks
 - GoldMine
 - Microsoft Outlook
 - InteleCRM
 - Sage

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Problems with many customer data systems

- ▶ Too much financial information
 - Forms, applications, reports, statements
 - Does not help people do their job
- ▶ No measurement of revenue driving factors
 - What does quality of service mean
 - Customer retention = ?? \$\$
- ▶ Measurement of Cost saving factors
- ▶ Information their – but not used

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CRM is a Process

- ▶ Identifies the right clients
 - Profitable clients and Opportunities
- ▶ Build Customer loyalty (= revenues)
- ▶ Reduce cost through micromarketing
 - Lower cost of customer acquisition
- ▶ Creates customer centric organization

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Non – Tech Hurdles

- ▶ Getting the Data
 - The right data
 - Timely data
- ▶ Overcome Organizational Resistance
- ▶ Performance Measurement and Reward System
- ▶ Privacy Issues and Control of Data

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