

CRM - it works *for small enterprises too!*

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Overlooking how your business process and information design works will create a drag on your environment and hinder productivity. As with other business improvements, it does require hard work to achieve the results, and committing ample time at the beginning will make for better decisions when applying CRM to your business and a better implementation in the end.

This article outlines how to know your business is in need of CRM, some of the must-have aspects of a CRM implementation, and how to plan your CRM introduction to get the best results.

IS YOUR BUSINESS READY TO LEVERAGE CRM?

The really salient features of CRM are the accessibility of information and productivity improvements that it can deliver. These should be really appealing benefits for those considering CRM. The simplification of your business will be recognised by staff. Making life simpler has obvious benefits, so the time taken to improve processes can be easily justified. Discussing this topic with Andrew Segar of SimplicityCRM, he mentioned that if you give people something to make their life easier, there's a good chance they'll use it.



Photo courtesy of Maria at Ricoh's Contact Centre

Create a service interaction that's right for each customer segment.

The following points outline business scenarios where a CRM implementation should be seriously considered:

- Multiple databases, quotation systems, pricing lists, or contact management systems exist that are not linked,
- The sales team is not coordinated or integrated with customer service, and information cannot systematically pass between the two teams,
- The sales team create all the leads for new business generation, and when a new lead is received in Customer Service it is handled and then invisible to Sales,
- Manual sales processes and documents exist, particularly the workflow to the production unit of the company,
- No single storage location for agreed sales exists, so there is low visibility of sales for production or Customer Service,
- Customers are received by a different person on every interaction, and there is no way of automating the customer to return to the person they last spoke to,

- Your product or service is easily compared with your competitors, i.e. it is a commodity or near commodity, and you need to differentiate within your market.

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With the integration of telephone and online systems and the database you can easily overcome having to make repetitive requests for customer information whether by phone, website or IVR.

CRM MUST-HAVES:

A CRM environment needs to integrate many aspects of the systems and processes of the organisation to justify the implementation. Whilst this is an overall feature, there are many variables that may be included in the program, and each needs to be considered, such as:

- Business applications integration: bring disparate software applications together so that different parts of the organisation can use information from other functions, e.g. sales quotations are made available to the production unit without needing to be manually transferred. Financial information can draw upon sales and service information to deliver individual customer value and profitability. The value of small customers can then be determined just as easily as large customers.
- Single set of customer records: eliminate the multiple databases that exist for various purposes throughout the company, and have all staff entering customer information into the same base. With CRM, all customer interactions can be recorded into the database regardless of which staff member or part of the company the customer last spoke with.
- Process review: creating a CRM environment must include reviewing the business' drivers and processes. Simply introducing a new CRM software suite does not create a customer relationship management environment. This requires focus on defined processes that flow between departments and

extracting the tasks and activities that do not add value for the business in the process.

- Telephony systems integrated to the accounts: establish the levels of service your best customers should receive, and then differentiate them through telephony design and management. Even with a very simple telephone system there are ways to channel selected accounts for superior treatment.
- Universal customer data: expect to achieve a single organisation-wide customer list where all names, addresses, and phone numbers are up to date as a minimum requirement of CRM. For any small enterprise this is a major achievement because every form of communication can be correct from invoices to Marketing to the spoken greeting during an outbound sales call. A more sophisticated CRM implementation may include database-telephony integration (CTI) so that accounts screen-pop automatically when the customer calls the company. Knowing details are correct

Summary

If you think that you're too busy, your business is too small, or that customer relationship management is a fad that's been and gone, you may be missing critical signs in your business. You may just be unaware of the productivity benefits that CRM offers. Telltale signs that a company desperately needs to introduce a CRM environment are very evident, such as if your organisation relies heavily on manual processes. Introducing a CRM environment will require focus and time upfront to provide a foundation for a great project result, but the benefits are clearly identifiable.

In a CRM environment, Sales, Customer Service, and Production staff work from one customer base, with consistent information, and where each interaction recorded on the customer record is available to all staff who need to access it. Increased flow of information throughout your business will help you differentiate the services and products that you take to market.

Starting a project to create a CRM environment is only partially about the installation of a software application. The real benefits come from delivering process improvement, greater visibility of customer information and providing the level of service appropriate to each segment of your customer base.

is a confidence booster for staff when they are expected to proactively welcome the customer by name.

Nick Egerton of UCMS Solutions points out that with the integration of telephone and online systems and the database you can easily overcome having to make repetitive requests for customer information whether by phone, website or IVR. Customers do appreciate being recognised personally, and not having to reintroduce themselves regularly.

PLANNING YOUR CRM PROJECT

A CRM implementation for a small enterprise certainly involves the installation of a software application, but it is important to realise that it is not all about the CRM software. For CRM to be successful, aim for about half of the work to be business related. If you are not a software geek then good news has arrived - the program also includes consultative tasks such as:

- Define the business requirements - what is the information that staff need for managing new customer enquiries, quotes, orders and business proposals? What reporting do staff need for monthly, quarterly and annual reports from the sales, service and information technology functions?
- Customisation - apply the business requirements to the screens and processes of the off-the-shelf CRM application to assess if it fits your business. Expect to request some customisation from the software provider, and equally you'll need to make business process changes.
- Business sponsors and reference groups - determine who will review and comment on the CRM environment design, and ultimately who will approve it.
- Data conversion - your current data set is unlikely to drop perfectly into the fields of the new application. You will need to prepare to manage data conversion.

Case study

MAXIM GROUP, AUCKLAND – BRANDING AND DESIGN AGENCY

For Maxim, achieving an integrated environment comprising customer, production and billing was their aim. Today they are seeing the benefits, and cumulative benefits rather than one dimensional at that. When work is quoted to a client, the quote and its components are held in their proprietary system for designers to monitor work options against the budget, resources and time schedule. The previous pen and paper timesheets have been discarded as time consumed is now recorded directly against the production job on-line.

For MAXIM's clients, there is a huge benefit in increased visibility and control. Clients have login access into the environment to identify job progress, job costs from past work, and budget available on current jobs. This is highly valued by large clients who have multiple jobs running concurrently, and who need to refer to previous work for budget estimation and comparison. It also leaves MAXIM free to focus on the value adding work rather than reporting about budget status and archived files (which are now highly accessible online).

You don't need to feel that a quote-production environment such as this involved international CRM developers - it was all developed in-house from MAXIM's own ideas and aspirations. This case achieves most of the core CRM principles including a single customer base, integrated quote to production process, sales-production-finance having full visibility of all stages of production, and simpler processes.

- Training - there will be some training involved to bring staff into the new environment. The software vendor training will explain the application, and you will need to supplement it with training about the changes for your processes.

- Specialist support - when the program goes live is just the beginning of your new world. Don't allow your project managers to leave you on your own, continue the support in several ways; IT helpdesk support for users, process support in the business, reporting transition, and business continuity advice.



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