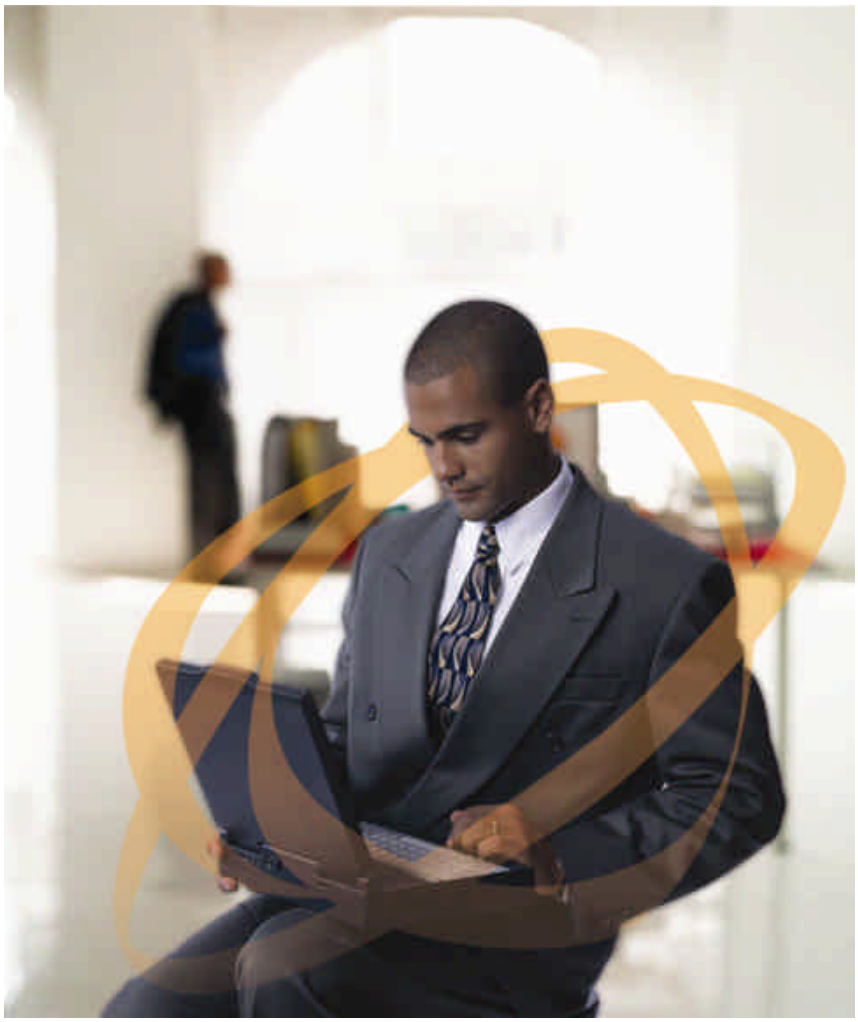

Choosing a CRM solution

Achiever software

Contents

Choosing a CRM solution **1**

Introduction 3

Put the customer at the heart of your organisation 3

Benefit from advances in technology 3

Benchmarking 4

CRM solutions 4

CRM solution suppliers 6

Summary 8

Appendices 9

Questions suppliers try to avoid 10

About the authors 13

Introduction

Organisations choose to implement Customer Relationship Management (CRM) solutions for a number of different reasons. Whatever benefits an organisation seeks to gain through CRM it is important to remain focused on delivering tangible return on investment from the solution, for example, to use CRM to drive and achieve real business benefits such as providing cost savings, streamlining business processes and improving performance. To achieve real benefits from CRM the objectives for implementing CRM must be aligned with core business goals and strategy.

Choosing a solution that is unique to your individual requirements and a supplier that will work with your business to understand your needs is paramount to ensuring a successful implementation of CRM.

Put the customer at the heart of your organisation

Whether you are providing services or selling products to individuals, businesses or both, your driving aim must be to place customers at the heart of your business and improve the overall customer experience.

To be successful, effective and innovative organisations need to:

- Deliver user focused and personalised services
- Drive up quality and encourage innovation
- Improve efficiency and productivity
- Join up services and minimise separation
- Strengthen accountability

Understanding your customers is the first step in achieving improved service delivery. Creating a consolidated, holistic view of each customer, whether across a single organisation or a group, and capturing information from all touch-points and across all functions, allows you to better understand the customer and their needs. Furthermore, your internal communication is also improved through the sharing and transfer of knowledge.

Streamlining your business processes means all customers are managed in a consistent, professional manner, whilst ensuring the appropriate level of information is captured to resolve or progress the enquiry.

Benefit from advances in technology

Advances in technology provide improved accessibility of information both in terms of data availability, volume management and security.

Some web browser-based applications require zero-footprint on the client PCs meaning no specific solution software is loaded and users can access the application from any machine via a web-browser, such as Internet Explorer. This approach simplifies solution roll-out, maintenance and upgrades.

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New methods for systems integration, such as Web Services and XML, are enabling solutions to transfer selected information, irrespective of platform, and provide users with a complete view of each customer without compromising data security.

Integration with 3rd party applications, such as telephony and eMail, facilitates communication with customers and effective management of enquiries.

Web-based technology allows for the creation of on-line internal and external customer portals to promote self-service and improve visibility of information. This can lead to significant cost reductions and the ability to provide measurable, quantifiable return on investment (ROI) by implementing these types of solutions.

Benchmarking

When implementing any business solution it is important to understand the cost reductions that will be delivered by the solution so ROI can be measured. Identifying these early on in the process is critical to ensure the appropriate measures are in place to assess solution success.

Determining what to measure can be difficult and the emphasis is to ensure any targets set are tangible and meaningful for both the organisation and the customer. Setting a target of handling all incoming calls within a defined period, for example 2 minutes, may be of interest to your business but if the call is not answered appropriately and the customer has to call back several times to obtain a correct response this cannot be viewed as a suitable measure for customer service.

More fitting targets could be around the number of satisfied customers, return on investment or success from marketing activity, or the percentage of responses handled within the agreed service level agreements. The introduction of on-line surveys and questionnaires on completion of random calls or all calls handled within a period may be a more accurate measurement for assessing customer service provision.

Benchmarking and targets should be continuously adapted to take into consideration evolving business processes, improving performance and changes in legislation.

CRM solutions

Implementing CRM is not simply an IT-led project but involves changes in business strategy and culture. It is, however, supported by software solutions to allow you to effectively manage your customer relationships and excel in your customer service delivery.

Not all CRM solutions are the same. Understanding the type of system, benefits and functionality you need in a CRM solution is critical to making an informed choice. For example, identify whether you are looking for a solution that is integral to achieving your business objectives or a system that simply allows you to record customer enquiries.

When looking for a solution that is to form part of your business strategy for the medium- to long-term there are important considerations to be made:

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1. Measuring return on investment (ROI)

Investment in time, money and resources is required to successfully implement any solution. Understanding how you are going to measure your return on your investment (ROI) must be considered early in the process. Recognizing your current position is essential to highlight any improvements.

Any measurements identified should be tangible and provide advancement towards achieving your business objectives.

Measuring and identifying ROI should not stop once the solution is working in a live environment but should be constantly readdressed and reassessed to ensure continuous improvement.

2. Configurability and flexibility

The way you manage your customers is unique. Organisations are constantly striving to improve performance and efficiency in line with new working practices, internally set targets and legislation. Solutions can help you streamline your processes to improve your customer service delivery, however, these need to be flexible and adaptable to ensure they continue to be relevant and meet your requirements.

Involvement in the design and creation of any solution will allow you to take greater system ownership and make sure that any terminology used is relevant to promote user-acceptance.

Be aware of new functionality that has been added to the solution to allow you to assess and take advantage of relevant features.

Recognise that go live is only the beginning and that functionality and objectives for the system should be regularly reviewed to ensure optimum benefit is gained from the solution.

3. Diverse processes and data requirements

Whether you are implementing a CRM solution within one organisation or across a group, each team of individuals will have different data and business process requirements. It is essential that these variations are preserved to ensure the required data is captured to successfully manage the enquiry.

Although the data and process requirements may vary, it is valuable to maintain a common user-interface and data integrity for management reporting and benchmarking.

4. Protection of information

Information may be sensitive within individual teams, within an organisation or across individuals. Data security filters should ensure that users only have access to authorised information on screen, via reports or when extracting information. Customisation options should allow users access to functionality in accordance with their access level.

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5. Integrated solution

Implementing CRM can also involve introducing a range of new solutions to the business or could be part of a complete business solution involving multiple products of which the CRM solution may be just one piece in the jigsaw.

It is important that your CRM solution is able to integrate with the appropriate systems or has a strong history/experience of integrating with other applications, to provide additional benefits and complete flexibility.

Integrating your CRM solution offers benefits including:

- Consolidated view of each customer without compromising data or system security
- Improved efficiency with less duplication of work
- Improved user-acceptance with less systems to access and learn
- Improved data integrity by reducing errors caused by double entry

Fit your chosen solution into your existing architecture, whether Oracle or Microsoft SQL Server, using Microsoft Outlook, Lotus Notes or Novell GroupWise eMail, to avoid additional non-essential software costs.

6. Escalations and alerts

Take a more pro-active approach to customer service by speaking to customers before the deadline is due. Automated alerts can notify managers and users when a call is due for resolution or when a deadline date is due. Escalation procedures provide additional notifications for managers to address enquiries that are currently likely to fail to meet service level agreements.

Communication with the customer on enquiry progression is vital to promoting quality customer service. Implementing courtesy calls at defined stages in the enquiry management process means your customers stay informed.

CRM solution suppliers

Building a relationship with your CRM solution supplier will facilitate project success. It is important to trust and feel comfortable with your chosen supplier, and to seek to work in close partnership to promote the required mutual understanding and respect for each other.

Discuss meeting your supplier's project team beforehand to assess the team that you will be working closely with and highlight relevant experience. Confirm other projects that your supplier's project team may be working on at the same time to establish possible resource conflicts.

Any project undertaken requires compromise from both parties to ensure success. Take time to speak to the supplier's existing customers to find out how the supplier works, including difficulties encountered and how these were resolved.

Gaining knowledge of what tools are used to customise the solution and how bug fixes are managed is also advisable especially if the supplier is not the original software manufacturer.

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Identify the methodology to be used and whether this can be adapted to supplement your own procedures and processes. Throughout the project there should be key project deliverables and milestones and is it essential that you understand when these take place and what is required.

Understand post-go live processes to determine the levels of support and access to consultants and trainers. Many suppliers have dedicated helpline staff and it is important that you establish how this team will be briefed on your solution, stay up-to-date on your evolving system and appreciate your working practices to provide satisfactory levels of support.

Sector best practice should also be considered and working with your supplier to make sure that you benefit from their experience gained from implementing previous similar projects.

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Summary

When implementing CRM ensure the focus remains on improving customer service delivery, whilst driving efficiency and productivity gains. Successfully putting CRM into practice involves adapting business strategy and culture supported by the right software solutions.

To ensure on-going success of the organisation it is important to:

- Keep continued focus on the end customer experience
- Focus on innovation, best practice and continuous improvement
- Refresh role and goal clarity
- Have a documented change management discipline
- Have a culture of ongoing communication and re-enforcement

A CRM solution can assist in promoting quality customer service delivery in the organisation leading to improved customer satisfaction. In order to help choose the right solution for your organisation, take into consideration the following:

- Understand what type of system your business needs
- Disregard any unsuitable contenders early on if they do not meet your corporate policy constraints
- Ask open, probing questions that force suppliers to provide evidence of experience[1]
- Find the solution's limitations as not all software is suitable for everyone
- Be realistic about what you want to achieve with your budget, timescales and resource
- Size of company does not necessarily mean they are capable of delivering your solution to timescales and budget
- Try to speak to and visit supplier customers

[1] The appendices contain some sample questions to ask suppliers

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Appendices

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Questions suppliers try to avoid

Detailed below is a list of possible questions to ask potential suppliers throughout the decision-making process. Select the questions most appropriate to you as not all questions will be relevant to every organisation.

Preparation checklist

1. Clear business case
    - Business objectives and critical success factors
    - Return on investment (ROI) measures
2. Functionality checklist
    - Necessary
    - Nice to have
3. List of constraints
    - Fixed or otherwise

Standard questions

These are the questions suppliers typically face by potential customers. These are still relevant and you may decide to pose these to your short-listed suppliers.

1. Do you meet my constraints – budgetary, timescales, technical, corporate profile and political?
2. Can you meet my necessary functionality requirements?
3. Can you meet my wish-list functionality requirements?
4. Can your system be customised?
5. Can you integrate with 3rd party applications?

Challenging questions – solution

These are more challenging questions about the solution that will force the supplier to provide you with more details about the solution. Not all questions will be applicable based on your requirements.

1. Are there any screens or elements of the system that cannot be customised?
2. Are there any areas of the system where workflow cannot be applied?
3. Can you hold business and consumer information in a single database and use different screens for each?
4. Can you hold different information for different categories of records of the same type?

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5. What is the largest number of concurrent users on a single database?
6. What is the largest number of records in a single database?
7. What is the largest data throughput in a single database?
8. **And can we speak to these customers?**
9. What data protection rules do you have in place?
10. Can you create filters based on the fields we specify?
11. Can you restrict visibility of records based on user or group?
12. Can you give our partners and customers access to their information?
13. Can you integrate with our bespoke applications?
14. Can we choose the method, frequency and information to be transferred between applications?
15. How does the system handle potential differences in data structure between integrated applications?
16. Can we restrict access to the shared information by user or group?
17. Can we create marketing/data selections using the shared information?
18. Can we implement business processes on shared information?
19. Do we need to install software on the client PCs and can we access the system from anywhere? What about if we are integrating with other applications?
20. Is there a limit to the information available on a PDA or Blackberry?

Challenging questions – services

These are more challenging questions about the services offered by the suppliers. Not all questions will be applicable based on your requirements.

1. How are upgrades applied to the system and what impact does this have on system usage?
2. How are changes to the standard configuration managed and implemented? Is my configuration affected when an upgrade is applied?
3. Who supports the integration and are there any additional costs associated with this? How are upgrades handled?
4. What skills and knowledge do we need to have to maintain and configure the system?
5. How much time and resource will we have to allocate to the project?

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6. How do you deliver the right level of training for our users?
7. What documentation will I receive with the software?
8. How long will it take to train our users?
9. What mechanisms do you have in place for identifying risks and managing issues?
10. What testing procedures do you have in place for the customised solution?
11. Have you lost any customers and what are the reasons for moving away from your product/service?
12. What proportion of your business comes from selling this type of system and what other products are in your portfolio?
13. How many members of staff are in your team and what are their roles and experience?
14. How many customers are you currently supporting on this type of system?
15. How long has your organisation been selling and implementing this type of solution?
16. How do you differentiate yourselves from your competition?

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About the authors

Founded in 1992, Achiever Software is a UK-based Customer Relationship Management (CRM) solutions developer that has extensive experience of implementing Corporate Information Management solutions in the Private and Public sectors.

Achiever Software's innovative partnership approach to the delivery and implementation of the Achiever Anyware application facilitates the creation of a solution that suits the unique business process and data requirements of each customer. Achiever's flexible relational data structure allows solutions to be designed to suit diverse business requirements across multiple departments and industry sectors including Public Sector, Education, Contact Centres and Financial Services.

Achiever is aimed at organisations requiring a Corporate Information Management solution capable of managing sophisticated and complex business requirements whilst allowing them to maintain system ownership.

Achiever's strong integration capabilities allow it to maximise the benefits of a customer's existing business systems to create a complete solution providing benefits such as improved visibility of information, increased productivity, and reduced administration work.

Data security is paramount. Achiever is designed to ensure only authorised users have access to sensitive and confidential information whether on screen or in reports.

Achiever has been successfully implemented in organisations including Surrey County Council, Papworth Trust, Warwickshire College of Education, Momenta (AEAT), VisitBritain, Skillset and NECC.

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