Effective Engagement

The key to ensuring a really successful Customer Relationship Management implementation

White Paper

Achiever software

Finding a CRM Solution that can meet your existing business needs is a challenge faced by many organisations. Successful Customer Relationship Management is much more than simply implementing software. Truly successful CRM must incorporate not only the existing business needs of your organisation, but must be able to evolve and adapt as your business changes.

Why do so many CRM projects fail?

The story of the CRM failure is all too common. So what are organisations doing wrong?
Why are CRM implementations not in tune with the organisations' requirements?
Why is it that CRM implementations often deliver only part of the solution expected?

Failure can be down to a number of issues. This could be due to the software being mis-sold resulting in solutions not entirely fit for purpose.

More commonly, it's due to a lack of in-depth engagement at the outset of a project meaning that the customer and supplier do not have a clear blue print which they can work to and measure against. As a consequence, any solution borne out of this kind of engagement will not be a good fit for the needs and wants of the customer.

Effective engagement, both within the business and with potential suppliers from the outset is absolutely critical to the success of any CRM project.

Achiever Software has taken a unique and innovative approach to the engagement process by incorporating the use of business process analysis technology right from the start of the engagement.

Effective Engagement using Business Process Analysis

Utilising BPA technology enables the ability to capture and store all information collected at the requirements gathering phase of the project. All levels of information from high level aspirations down to the granular detail of what screens will look like and how users will interact with the technology is captured. This process ensures that all the wants and needs of every key stakeholder within that organisation are fed into the system building up a complete picture of the solution.

The resulting information can outline key criteria such as:

- How each of these stakeholders interact with each other
- What business processes are required to underpin the solution end to end
- How the technology itself will interact within the business
- How it will integrate and work with other key technologies within that organisation.

Key Benefits

One of the key benefits of this unique approach to requirements gathering is that once all this information is available within the system it can then be comprehensively analysed and scenarios run to determine how a proposed solution will work within that organisations' environment before any development or implementation takes place. This in turn allows early identification of bottlenecks, improvements to business process and changes to the overall solution to be made again prior to any development having taken place.

All scenarios can be run under a real-load environment where the number of expected users interacting within the organisation can be analysed to ensure that the processes identified provide the most efficient route for the organisation and are fully optimised.

In short, working closely with your supplier at this early stage of the project allows for the definition of the best possible solution whilst having identified as many areas of efficiency improvement and best practice adoption as possible .

The result of the business process analysis phase then becomes the basis of the framework for the solution itself.

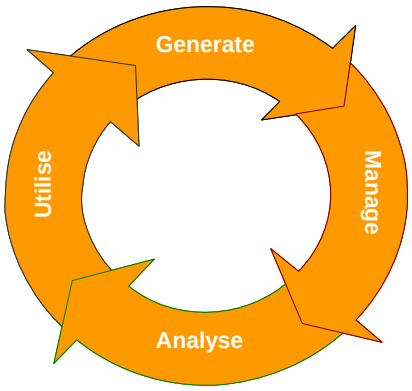
Three key benefits of this approach are:

1. A far more cost effective approach to customer engagement
2. De-risking of the possibility of delivering a solution that is not fit for purpose
3. It allows for the best possible solution being delivered first time every time

This is only the first step in the relationship with your supplier. The approach of working hand-in-hand on an ongoing basis and utilising this technology to drive continuous business improvement is called 'the round trip'.

The Round Trip

The Round Trip is an ongoing, iterative approach to continuous system and business improvement. It allows the customer and supplier to take the output from an existing solution and analyse it to understand how the system and/or process can be changed or enhanced. This information can be used to apply and trial improvements in a virtual environment without impacting on the live system. Following testing and review, improvements can be implemented into the live solution ensuring it continues to remain the best possible fit to meet ongoing needs of the business



Implementing defined requirements into your CRM Solution

The final step to this approach is implementing this best fit solution into the most suitable type of CRM software for your requirements.

Customers are increasingly looking for a solution provider that can work synergistically to deliver a complete end to end solution for them. The ideal CRM supplier will be able to quickly and effectively deliver a robust and scalable CRM solution that meets the varied needs of the organisation.

They should also be able to offer a complete solution integrating and incorporating other technologies such as business process management, business intelligence, document management, finance and telephony.

Building a close relationship with your supplier will facilitate project success. Make sure you make the most of their knowledge and experience of implementing solutions into similar organisations or implementations.

Practical steps to ensure that you implement a really successful CRM solution:

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
- 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

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, Medical Information Systems 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.

Achiever has been successfully implemented in organisations including Surrey County Council, T-Mobile, Newcastle College, Medical Research Council, Momenta (AEAT) and Skillset.

Achiever Software

Ashted Lock | Aston Science Park | Birmingham |B7 4AZ

T: 0121 380 1010 | E: info@achiever.co.uk | www.achiever.co.uk