Park Place
500-666 Burrard Street
Vancouver BC V6C 3P6
office 1 800 998 4547

Pauline O'Malley
Enterprises Inc.

How to Select CRM Technology

"The keys to successful customer relationship management? Strategy and organization first, technology second." – Harvard Business Review, 2002

The following 26 points can help when considering the acquisition of CRM (Customer Relationship Management) technology. You will note that most of the items relate directly to CRM process.

We recommend that you first ensure that your CRM processes are streamlined and then documented to reflect the measurable items indicated below. Work with a reputable CRM Process Strategist to assist you in the fine-tuning of your current systems. Then select the technology that will support, track and measure these multiple and often highly complex activities involved in all CRM transactions.

The Big Picture

1. 360 degree view of your customers encompassing all marketing, sales and customer service efforts by both staff and external representatives of company. This includes: actions and results of promotional campaigns (i.e. log sent regarding promotional and sales materials, follow up, discussion notes and outcomes of calls, visits, correspondence, etc.), lead referral tracking and follow up, RFQ process monitoring and timely quote delivery, current project status, order fulfillment status, etc.

2. Market intelligence reporting includes capabilities to analyze and report on customer trends (i.e. regional ordering levels, large account vs. small account activity, customer profiling by industry, etc.) All these requirements stem from the control needs of company's marketing plan and strategies.

3. An analysis and control tool for activity levels of external representatives and internal staff (i.e. level of service and support to measure differential of company from competition, are leads being followed up within minimum time parameters, are sales tasks and RFQs executed efficiently and on time, etc.)

4. A comprehensive sales analysis module (i.e. sales by territory, by staff and external representatives, by largest/smallest customers, etc.)

5. A knowledge/document sharing between company and representatives (i.e. digital collateral, training documentation, etc.)

General CRM Requirements

Customer Service:

1. Maintain a complete case history with instant access to all customer communication, including email, notes, calls, resolutions, etc.
2. Automatically capture customer inquiries from website and route cases to specific representatives based on customizable business rules.

3. An expandable knowledgebase that allows leverage of knowledge of product experts, standardized solutions, improve response time, and shorten ramp up time for new representatives.
4. Analyze and understand the sources of top customer inquiries to proactively address top issues to improve customer satisfaction and reduce volume of customer inquiries.
5. Real-time access to complete customer history to allow up-sell and cross-sell opportunities.
6. Integration with call center and back-office systems to enable support representatives to access relevant customer information such as inventory levels, delivery status, and billing information in order to deliver more effective customer service through a single point of contact.

Sales:

7. Transparent sales flow to enable efficient resource allocation.
8. Visible sales process to enable effective communication with staff and outside representatives to close deals by scheduling events, assigning tasks, coordinating meetings, flagging new opportunities, and updating client files on every account.
9. Offline updating capabilities when on the road.
10. Instant access to all customer communication history to increase collaboration between sales, customer service and support, and marketing personnel.

Marketing:

11. Ability to identify most effective sources for qualified leads.
12. List management capabilities to segment customers into identifiable groups and deliver a unique marketing message to each group or potential customer.
13. Facilitate customer communications, lead cultivation, and cross and up sell campaigns by delivering personalized messages via email directly to the inboxes of targeted customers and potential customers. Enable sales representative access to standard and customizable templates to ensure email messaging is consistent with marketing communication strategies.

Analysis & Reporting:

14. Sales Flow Visibility: Identify which deals are most likely to close and the largest deals in the “flow”. Enable resource allocation to most strategic deals.
15. Sales Process Analysis: Provide insight into why you are winning and losing deals to determine where representatives need better tools or training. Share CRM methodology and best practices.
16. Sales Representative Activity Metrics: Identify who the top performers are and formulate best practices from those activities to help other improve.
17. Revenue Forecast & Flow Trends: Identify potential land mines early and use historical trends to better predict future patterns.

Customer Service & Support Reporting:

18. Service and Support Performance: Measure average response times for customer inquiries, allowing tracking performance of support representatives.
19. Cases by Problem Type: Identify top reasons for customer inquiries and percentage of time spent on support, enabling reduction of case volume by proactively resolving common customer issues.

20. Cases by Strategic Accounts: Track the progress of open cases for all strategic customers, providing executives with an understanding of the issues facing top customers.
21. Cases by Origin: Determine the common channels used for logging customer inquiries. Identify increases in support expenses resulting from high usage of costly channels. Help quantify the benefits of deflecting cases to more cost-effective channels.

Marketing Reporting:

22. Campaign Effectiveness: Provide real-time insight into the success of individual initiatives and ongoing marketing campaigns. Allow tracking of campaigns from initial lead generation through closed sales, assess campaign effectiveness, and determine what market segments are most responsive.
23. Win-Loss Analysis: Measures win-loss trends and competitive threats to help prioritize product or service enhancements based on lost opportunities.
24. Lead Status: Provide insight into how leads are being used by the sales organization. Track lead status and follow up rates, ensuring timely and efficient follow up and reduced dropped leads.
25. Customer Demographics & Potential Customers: Identify customers and potential customers by key demographics, enabling immediate spotting of changes in customer and potential customer's behavior, as well as purchase trends by industry, size, geography, etc.

Reference Identification:

26. Identify reference customers that are available to close sales opportunities. Also identify the sales professionals and customer interaction history for the most strategic customer accounts.

About Pauline O'Malley

Pauline's passion is sales. As an entrepreneur, manager and top producer, Pauline's career spans the retail, insurance, technology and education sectors. Foreseeing a more holistic approach to selling, Pauline and her team of strategists embarked upon the development of a selling system that would integrate marketing, sales and customer service into one.

After three and a half years of research and testing with 260 companies and individuals, Pauline published *TheRevenueBuilder® – Making Customer Relationship Management Work!* in 2002.

In 2004, Pauline co-authored *WinWithoutPitching®* with Blair Enns exclusively for the communications and advertising industry. In 2006, Pauline, Blair Enns and Cal Harrison co-produced *BeyondReferrals™* for management consultants and professional services firms. *Lifestyle Selling for Women,* co-authored with Brenda Page, is now available in paperback and electronically.

Today, she and her team travel throughout the world assisting clients with their business development success.

For more information, contact Pauline O'Malley Cell 778-227-8715 Pauline@PaulineOMalley.com