

15 TIPS FOR CRM SUCCESS

PART 1 OF 2

1 Get the backing of upper management

In a lot of cases, the difference between a successful CRM strategy and wasting a shed load of money, is whether or not the upper management fully back the CRM strategy.

CRM is an ethos and not an IT implementation (although IT helps CRM become more effective and streamlined).

2 Implement a project team

Too often, strategies are developed by a single department who fail to include key stakeholders who could add value, insights and integral information when developing a CRM strategy.

Form a team with representatives across departments. Remember CRM is all about improving customer experience, so keep that as the core focus.

This visibility across departments will be paramount to business growth with CRM.

3

Define business objectives

A CRM strategy must be designed with your business objectives and customer requirements in mind.

Defining your business goals, KPI's and problems at the start lays the ground work for implementing CRM.

4 Identify who your customer is

Within your organisation, various departments have different definitions of who the customer is. It's a good idea to iron these definitions out and then laser focus on how you could improve the customer experience.

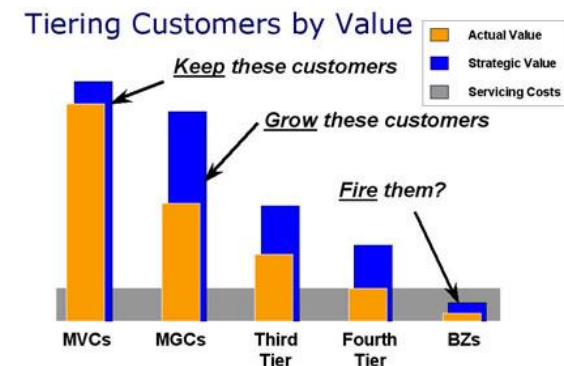
5 Identify different segments and their value

Know who you want to serve. Understand what that customer wants?

Prioritize.

What is the customer worth and what is their potential worth?

How can you increase their optimum value?



6 Set some customer experience goals

Sometimes we think too big and nothing gets done. What slight improvements could you make to improve the customer experience? Have you asked them? A 1% improvement to the customer experience adds up over the course of a year.

The key to developing a successful new customer experience is to develop a response to a customer need that is **unique, compelling, and adoptable**. A response so attractive that customers are willing to change long-standing, often deeply ingrained behaviour.

7 Map out what customer data you want

You'll need to know what customer data is necessary and from what system it will originate.

(e.g. Purchase behaviour, demographics, interests etc.)

8 Get personal

Learn your customers' personal needs and profiles and target your service to each individual. It will make them feel important and that you value the relationship.

In order to do this effectively, you need to staff and empower your talent pool appropriately to deliver on the customer experience. To do this effectively, focus on people, process and tools.

9 System metrics

You want to know how your CRM strategy is performing right?

Setup some key metrics to measure how effective your CRM strategy is.

(e.g. Measure referral rate increases)

10 Setup customer engagement programmes

Point 5 is all about segmenting your customers. Once this is achieved, you need a plan on how to keep them engaged with your brand.

Each segment is different and as the chart shows, some segments are more valuable than others.

11 Collect data

Every customer interaction is an opportunity to learn more about that customer. Think about how you can collect more data. But before you do, think about how the data you propose to collect can be broken down and used to improve the customer experience.

12 Monitor the customer journey

Walk a mile in your customers shoes to gain a full insight into the experience you are offering.

Is it enough to create raving fans?

Are there any shortfalls that need to be fixed?

Too many companies roll out a new customer experience without testing it thoroughly. This is key for continuous improvement to take place.

13 Automate processes

Streamline manual processes that drain resources and spend the extra time focusing on providing customers with a better experience.

14 Empower staff

Give front line staff the ability to please the customer. Too often they can't make timely decisions nor can they present relevant offers - effectively facilitating customer dissatisfaction and defection.

15 Communicate

The importance of communicating the CRM strategy to the rest of the organisation and how it's a 'win win' situation when implemented right, is integral.

There will be reluctance to change of some form, but that's inevitable.

However, that's when communicating the benefits for both the customer, organisation and all stakeholders involved comes in.

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