# Technology Optimization Part 8: Customer Relationship Management

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Customer Relationship Management (CRM) has held great promise for over a decade. By consolidating customer information and interaction history in a central repository, employees in different roles and departments would get a complete picture of their organization's relationship with each customer. It was supposed to be a win-win scenario – heightened efficiency and effectiveness for the company with a corresponding improvement in the customer experience. All too often, poor execution, inattention to functional and/or interface requirements for real-time interactions, and stale content and workflows turned the call center's symphony of benefits into a band of sour notes. The net result: many reps treat CRM as a burden and avoid using it. CRM is too important to relegate it to nuisance status. If you have an underutilized CRM, it's time for a restart. If you haven't got CRM, it's time to learn from your predecessors' mistakes and apply "best practices" when you're ready to leverage this powerful technology.

CRM comes in many forms – home-grown, premise-based, and more recently, hosted or Software as a Service. Although "CRM nirvana" is an enterprise-wide tool, the challenge of getting all of the data, processes, and organizational elements aligned to leverage the technology can be overwhelming. So the starting point for a useful solution is figuring out where and how the "80-20 rule" fits in your environment. Project scope must reflect a clear sense of the business strategy, a concrete statement of what the company will achieve, and an action plan that incorporates people and process elements alongside technology deployment. If you're long on technology and short on strategy, people, and process, you are asking for trouble.

Here are some examples of "typical" CRM issues:

- If CRM isn't aligned with the call center's workflow, it is a seen as more of a hindrance than a help in servicing and selling to customers. IT blames the call center for its process issues, and the call center blames IT for poor technology deployment. In many cases, the problem may boil down to the need for change management.
- The "we're different" mindset leads folks down the path of building a highly customized solution rather than working with best practices-based tools. They wind up creating a monster that can no longer evolve, get support, or weather a vendor upgrade.
- Makeshift solutions and processes crop up when system designers lack an understanding of the customer life cycle, the role of each organizational group in that life cycle, and the processes required to ensure end-to-end support through customer identification, attraction, acquisition, and optimization (or marketing, sales, and service). The resulting inefficiency and errors diminish the project's ROI.
- Call centers may adopt a view of CRM that is too narrow and build an isolated tool that only shows part of the picture. Crucial data about customers and interactions either don't exist or are inaccessible. The nightmare scenario is multiple incompatible CRM solutions each housing part of the story – marketing, product group, field sales, branches, billing/accounting, fulfillment, etc.
- CRM suffers a chronic lack of resources (people!) to keep it "alive" through ongoing data capture, workflow updates, reporting and analysis, and use (processes!). In a fast-paced world, the exciting new technology can look old and out of date in a matter of months.

 

Whether you have a home-grown CRM, premise-based CRM, or hosted CRM, chances are you can get more value out of the solution for your center. And if you are embarking on a CRM journey, keep these "best practices" in mind.

1. Start with vision and strategy. Define CRM's role and ensure that your deployment supports that role across marketing, sales, and service. Build CRM around the customer life cycle and consider the call center's role in each step of that life cycle. This mindset will force a focus on customer interactions and experience. Consider the enterprise view, if possible. Build strategy and plans for the call center with an eye toward its interactions with the rest of the organization.
2. Don't focus just on the technology. Define processes and allocate resources to get value from technology. Process elements include initial workflow definitions and processes to review and revise workflows. Define and align the people elements – such as organizational roles and responsibilities – with the process plans.
3. Keep in mind that CRM is never "done." It needs to evolve to respond to business needs and react to business outcomes. Success in ongoing application requires IT and business collaboration.
4. Configure the technology, don't customize. That way you leverage best practices while applying the tool to your environment, and that tool can continue to evolve with your business needs and the product's capabilities.