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SOFTWARE

What makes a good CRM package?

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A “one size fits all” approach to CRM rarely brings substantial business value. Before proceeding with a CRM system, a company must carefully define its CRM strategy and evaluate the technology. Shortcomings on either side can lead to failure. With an emphasis on business requirements and an understanding of the technology that enables the strategy, the company can ensure a successful and profitable implementation. There are several key characteristics of CRM software that are important to keep in mind. These include:

1. Ease of Integration

A company’s customer data and processes are located in many different support systems. To avoid replacing these support systems, companies need their CRM systems to integrate seamlessly. A lack of proper integration can lead to longer project timelines and increased costs.

Effective integration tools include adapters and object interfaces, support for multiple integration methods, proper integration consulting and training, and adoption of standards-based architectures. The most important factor to consider is compliance with standards-based architecture. Such open architectures make it far easier to develop interfaces to the many legacy and operational systems that may be required for an implementation, and make it easier to maintain.

2. Ease of Customization

CRM should be easily customized to meet specific business needs. Upgradability is also a key consideration. To

deliver ease of customization, CRM systems must exemplify the following characteristics: system extensibility, including database, user interface and business logic; ease of end-user configurability; an integrated development environment; support for industry-standard customization tools; upgradability of all customizations; and extendable and modular architecture.

Many companies say that mapping their business rules to software is one of the biggest “pain points” of implementing a CRM system. CRM software has change management capabilities that allow IT departments, customer care executives and marketing departments to quickly and easily query and modify systems to accommodate the fast-changing needs of the marketplace. In any implementation, the biggest mistake is to let the technology features drive CRM functionality. CRM means changing your focus and the business processes to support it and then applying technology to automate those new processes. This is why CRM needs to be customized.

3. Ease of Scalability

Scalability is important because it addresses business needs into the future. For CRM software to be successful, it must be able to handle the volume of customer inquiries, orders and other information it receives daily. Scalability means not only adding new users and application modules, but also supporting real-time distributed databases, wireless and disconnected users, and multiple interaction channels. An open, standards-based architecture is vital for delivering CRM scalability. Software is

needed that will grow with the business as it adds modules, features, users, customers and Web users.

4. Rich Out-of-the-Box Functionality

The depth and robustness of a CRM vendor’s out-of-the-box functionality is critical to a successful implementation. The greater the functionality, the less customization is required. While it’s true that there is no such thing as off-the-shelf CRM, quick and easy functionality enables implementation, supports the organization’s business processes and delivers faster return on investment.

5. Business Process Integration

Process flows determine the course of the customer life cycle and the manner in which it’s managed, ensuring repeatability, consistency and efficiency. With business processes running through multiple front- and back-office systems, it’s imperative to be able to manage and display these processes through a single, unified front end — both to improve call center effectiveness and customer satisfaction. Out-of-the-box process flows and management tools deliver all of these benefits, as well as cutting the amount of customization required — shortening the time to production and lowering implementation costs.

6. Actionable Customer Data

A CRM system can enable companies to cut costs and increase efficiencies in business processes that touch every facet of an organization. In the contact center, agents require more than just data; they need information upon which they can act quickly and confidently to maximize

every customer interaction. Troubleshooting groups resolve problems more efficiently and ensure that issues need be resolved only once. Sales is provided greater insight into customers so it can anticipate their needs and offer valuable solutions proactively, and analytics capabilities ensure that marketing campaigns always have the highest possible success rate.

Particularly in high-volume contact centers, the total emphasis on the creation of a 360-degree view of a customer leads to a flawed CRM strategy and doesn't necessarily lead to more profitable customer relationships. Agents require information that clearly directs

them to a desired outcome. Insights gleaned from customer analytics may not be presented in an appropriate form for the agent. A better use of 360-degree knowledge of the customer is to present this knowledge to the agent as actionable data. These prompts can occur as a flash on the agent's desktop or as an automatic trigger of relevant scripts. But the key is to focus on providing actionable information that will achieve the desired result.

In addition to all of the above issues, it's critical to monitor and measure the success of the CRM implementation on an ongoing basis. This isn't a one-time event, but an ongoing process, from

presales through the many phases of the CRM implementation. Measuring ROI is crucial in times of tight IT budgets. All business units must be a part of the assessment in order to present an accurate picture of the ROI achieved. In today's increasingly competitive market, companies are becoming increasingly aware of the need for CRM to focus on individual relationships and maximize profitability. Keeping all of these important factors in mind will ensure a successful execution of a CRM strategy. ▀

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