First to Capitalize on Data – you Need a System!

You all have a system in place

Outlook to SAP – all can be considered your CRM
What is a CRM?

- Marketing
- Sales
- Servicing
- Management

An application to manage Customers, and streamline/standardize processes
History of Formal CRM Systems

✓ Contact Manager: PC's ACT/Maximizer/Goldmine (mid/Late 1980's),


✓ Customer Relationship Manager: ERP's Oracle/BAAN/SAP (mid 1990's)

✓ Salesforce.com, web-based CRM, 1999 – SAAS

Desktop, server, and web/SAAS solutions in use today
Major Choices

Outlook
Act/Maximizer/Goldmine
SugarCRM
SalesForce.com
Microsoft Dynamics
Oracle/ Siebel
SAP

100’s of CRM choices!
Considerations When Selecting

✓ What do you want it to do (Requirements)
✓ Who will be using it
✓ Existing software/Infrastructure
✓ Future plans

Guiding Principles
Considerations When Implementing

- Project Management
- Who will implement (Vendor?)
- Configuration/Customization requirements
- Data Migration
- Training and Support
- Security
Corporate Perspective

- Business Rules & Philosophy
- Access Permissions
- Data Management Ownership & Control

Discipline in Approach:
- processes, nomenclature, data normalization/Mgt
Individual Perspective - Adoption

- Ease of Use
- Accessible and Reliable
- Makes them more productive/successful
- Accept Feedback from Users

Management should be firmly committed but open minded with users
Pitfalls

- Not Identifying Requirements – It’s a business Problem
- Poor Planning
- Lack of Commitment
- Lack of Resources
- Inadequate User Adoption/Training
- Bad Data
- Bad and Inconsistent Processes
- Implementing too much too soon
- Not Monitoring and Adapting with Feedback

Must be driven by Management, not IT!
Features are less important than User Adoption
Features are less important than Data Credibility
Features are less important than Platform
Features are less important than Reliability

CIO Magazine David Taber, December 07, 2009
Data Collection and Management

- Metrics - How many, how much, how often...
- Analytics – Compare, Ratio and Contrast
- Forecasting - good data and vetted ratios make forecasting more accurate

With good historical data, lots of options – native, configured customized, and plugin tools
- Software Cost
- Vendor Cost
- Employee Cost

Can’t afford to have one/ can’t afford to not have one –

ROI Streamline/Standardize Processes, Efficiency, Opportunity and Data gain
What’s In Store for the Future

✓ Web 2.0 Social Media
✓ Integration to more aspects of business software
✓ Automation - auto response, leads, forecasts, processes
✓ Intelligent work assignments

CRM becomes more deeply embedded in the overall business software
QUESTIONS ?
THANK YOU!