

# **Realising CRM -** **The Effective Process of Implementing CRM**

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## Realising CRM; Customer relationship management is not a technology acquisition but a goal that must be realised within the enterprise.

Customer Relationship management requires a focus and commitment by business in order to become a value centre. CRM can not be seen as a mere technology investment which is purchased, deployed and then delivers value in itself. Instead, CRM is a concept that must be realised within the organisation and with the support of its staff. For full effectiveness, CRM must be seen as an ongoing goal in order to stay in line with business objectives and be able to change with the enterprise.

### More Than Technology

CRM is a methodology and in order to be successful, it requires several elements to be aligned within the business. This includes both the attitudes of customer-facing members of staff and their back-office colleagues. Customers must also be kept front-of-mind at all times. Software compliments the overall CRM environment within the organisation and provides a tool for staff, but does not define CRM in itself.

Without software there is still methodology and practice to be considered. Software allows the business to more effectively manage customer experience and enable other areas of the business to proactively improve customer engagements, enhancing the value derived from information relating to those engagements.

If CRM is realised in methodology, practice and technology, it is able to go beyond merely managing customer relationship and deliver reflexive benefit to all areas of business. This is the differentiator that sets modern CRM as a value centre apart from conventional, silo CRM which did little more than facilitate the collection of information surrounding customer engagements.

An example of using CRM to enhance business can be provided in the context of a cellular service provider. Such an organisation might plan to release a new service package aimed at, for example, 16 to 24 year-olds. The product might have been researched for this difficult demographic, but in order to maximise the offering before actually taking it to market the product needs to be shaped and this process is based on minimising risk. This is an area where effective CRM can help by providing intelligence - and not something that conventional relationship management would have offered.

### An Orchestrated Process

Bringing value from CRM to business means incorporating people, process and technology in an effective strategy that describes the ongoing goal of managing relationships in the interest of business. It must deal with the enablement of process and business intelligence with continuous reporting so that adaptive enhancements can be made, as required.

This realisation has to be born at a management level. Management must own the practice and methodology required for effective CRM, while IT owns the application itself and the distribution of information. But customer-facing staff are ultimately responsible for what CRM amounts to within the business.

The focus of staff should be firmly set on customer expectations. For this reason an emphasis must then be placed on defining the customer experience that the business is striving for, first and foremost. Once this has been decided different areas of the business must be identified as potential touch points for customers. These can then be enhanced or expanded in improving the overall customer experience in engaging with the business and in reaching the desired

outcome. Many approach this scenario the wrong way around, looking first at the practicalities of business and accepting customer experience as a side-effect.

It is useful for management to map out models of customer engagement and how they would be handed from one department to the next within the business in formulating a picture of what customer experience should look like. Data from these touch point's systems must then be correlated to form a holistic view.

## Change Management

The next step is for processes to be established or modified to affect the desired customer experience. This does not just deal with changes to technology, but also in procedure and approach.

Once an understanding has been gained of this process and decisions have been made surrounding the required changes, then only is it possible to look at how software can be used in achieving the goals of CRM. Because the changes might have potentially large consequences, it is often beneficial to implement these in digestible chunks, rather than seeking to rapidly change everything. Rapid change can cause problems, especially in terms of internal acceptance.

People respond positively to change as a slow process. An understanding of a solution must first be gained before individuals will take ownership of that solution – this is a vital step if it is to become an effective solution.

When business takes ownership of a CRM solution that compromises technology and process in an adaptive strategy, then only does customer information and its proliferation throughout the business' technological environment begin to render value. This is not just simply acquired; it must be planned, executed, achieved – and continue to adapt and scale with the business.

## About the Author

*Vivek Thomas is Managing Director EMEA of Maximizer Software, a global leading provider of award winning CRM software systems for organisations ranging from home offices to multi-billion dollar global organisations. For more information on Maximizer Software and its CRM products please visit: [www.max.co.uk](http://www.max.co.uk)*

## About Maximizer Software

Maximizer Software is the world’s leading provider of affordable and easy-to-use customer relationship management (CRM) software applications. The Maximizer line of products help companies develop more responsive, personalised and profitable customer experiences. Built on a modern, Web-based architecture, Maximizer is easily integrated with existing corporate systems and features the latest in sales force automation, marketing automation, e-mail marketing and customer service technologies in a single mobile-accessible business management system. Maximizer Software has sold more than one million licences of its award-winning software solutions to companies ranging in size from entrepreneurs to multinational organisations. Customers include: Siemens, Société Générale, HSBC, TD Securities, Lockheed Martin, Brian Tracy International, Fisher & Paykel Healthcare, Oxford University Press, and Cathay Pacific.

Maximizer Software is a global business with an ecosystem of more than 8 000 corporate customers, 400 business partners and offices in the Americas, Europe/Middle East/Africa and Asia Pacific.

## Awards



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