

Without Integration CRM Misses the Mark

Exact Software, Exact In Business

Is Customer Relationship Management hot or not?

When you consider the deluge of criticism about CRM solutions it probably seems like the latter is true. In any case, CRM is not the cure-all hoped for back when the first solutions were introduced.

Why not?

The supplier frequently gets blamed when yields fail to materialize. Maybe justifiably so sometimes, but not always. The importance of system integration is often underestimated.

Why CRM?

The idea behind CRM is commendable. As a business, when your customers have concrete questions, you want to be able to provide them with concrete answers. You want to uphold agreements, understand what motivates customers, what their expectations are, what their unspoken needs are, what they want, and to anticipate those. The result is good customer contact for an effective working relationship and lasting loyalty. The guiding principle behind the first generation of CRM systems was: the customer is number one, and a CRM system makes it possible. That also explains why at the time of introduction CRM was presented as the ultimate solution for organizations striving to be more customer-oriented.

At the time, installing a CRM module would supposedly suffice when it came to strengthening customer ties. As such, we witnessed CRM implementations galore in the beginning phase of CRM. Now it's plain to see that many of them ran aground. Generally speaking, a number of explanations come to mind. Many CRM implementations turned out to be too slow and too expensive, integration with existing applications and databases proved a tangled mess, and dozens of CRM applications were characterized by bumbling interfaces. Many a business that decided to "do CRM" ended up flat on their face. The advantages promised were never realized, and CRM was written off as the latest in an endless line of hypes.

But the software isn't always the problem. The company situation can play just as big a role-if not bigger. If organizations are confronted with setbacks while carrying out CRM implementation, more than likely the project will meet an untimely demise. After implementation, too, it may turn out that the initial goals are unfeasible because even though the CRM application works, it hasn't been sufficiently integrated with the functionalities in the existing information systems.

To be sure, business processes were automated, but could not be fully utilized as a result of automation occurring with a lack of thought to structural improvements and integration.

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Companies often regarded CRM as an independent phenomenon that did not require any integration with other business systems. Nothing could be further from the truth. CRM is a total approach for entering into, maintaining and expanding customer relationships, and usually only achieves its full potential within an organization where the customer takes center stage throughout the entire company from the front office all the way to the back.

Therefore, integrating CRM with the existing management style is the key to achieving a customer and result-oriented organization. Applying CRM this way actually makes it a catalyst for improving yield; after all, there is a consistent and up to date customer profile in every channel of the organization, accompanied by integration among various systems for realizing the targeted customer processes. The way customers regard a business can improve greatly if they receive attention unrelated to the reasons for their contact, and if they receive the proper answers to their questions. To achieve this, all channels for customer contact must have access to every customer-related processes, relevant system functions and information. The only way to do this is by integrating business processes.

Integrated or non-integrated

How does CRM work in real life? A customer calls your company's service number to report a complaint about a product and mentions that he should have perhaps used a different product of yours for the application in question. Process integration determines how this lead is followed up. In a non-integrated CRM environment the employee only sees that the customer ended up at the service department and did not receive any service for a product. The customer is given another number to call. If the customer still has a complaint then it must be put in writing and submitted in duplicate to Customer Service.

In an integrated CRM environment your employee can look up if and when the product was delivered, consult the product specifications, see whether the customer paid for the product and determine whether the purchased product can be exchanged. Next, the employee can make a note of the specifications for the product type that the customer had in mind, compare these with the product purchased and decide whether this applies to his situation without having the customer tell his story all over again; he's done this once already. The customer is transferred only once to the right person within the company who can offer a more fine-tuned recommendation to result in an even better product. Then the employee can draw up a credit slip for the product delivered, arrange a courier for the return shipment, send a quote for the new product and create a provisional reservation in the product stocks. The result is a satisfied customer.

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Successful CRM implementation

In order for CRM implementation to succeed, the data from applications must be integrated into a single system. Over the years, virtually every company has used different financial, marketing, sales and service applications where data is entered. Incidentally, transferring master data doesn't necessarily have to take up a lot of time. Investing in an application that, for example, reads in and converts all existing data electronically via XML, offers a way out.

Clearly, the first step in an implementation process has to be integrating and migrating existing data from previously used applications into a sole database of centrally stored data, to which the entire organization has access. But all too often this is not the case. Studies by the American software company Pegasystems showed that 84% of the organizations interviewed have not integrated their business processes, which means many departments are entering the very same information into the system. This is nothing but a waste of time and money. When a company purchases new software solutions, the choice is often made to buy different systems for different departments. This is nothing but 'island automation,' where systems cannot communicate with one another, and a company-wide approach would have been the much wiser choice.

Whether CRM implementation succeeds is not solely dependent on technological circumstances. An organization's business ethics are undoubtedly just as important. The transformation from a product-oriented to a customer-oriented business must be carried out in the entire organization. After all, a poorly trained receptionist or one with a bad attitude can be just as deleterious to generating new business as an unproductive meeting among senior management. Meeting the conditions set forth here will produce benefits for the customer and company alike. Better service, heightened customer friendliness, and higher profits.

Exact Software is a multinational public company with customers in more than 100 countries. Started in the early 1980's, Exact is a leader in delivering a full range of enterprise software solutions to mid-sized companies. Exact's product offerings consist of e-Synergy and Macola Enterprise Suite. Exact Software is a client of Virtual Causeway and has graciously shared their insight for this two part series about Customer Relationship Management. Exact Software has been involved in a lead generation program with Virtual Causeway with a focus to build on their existing success in the North American Marketplace.

For further information about Exact Software and their solutions please visit <http://www.exactamerica.com>

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