



CHECKLIST CRM



Dataforensics



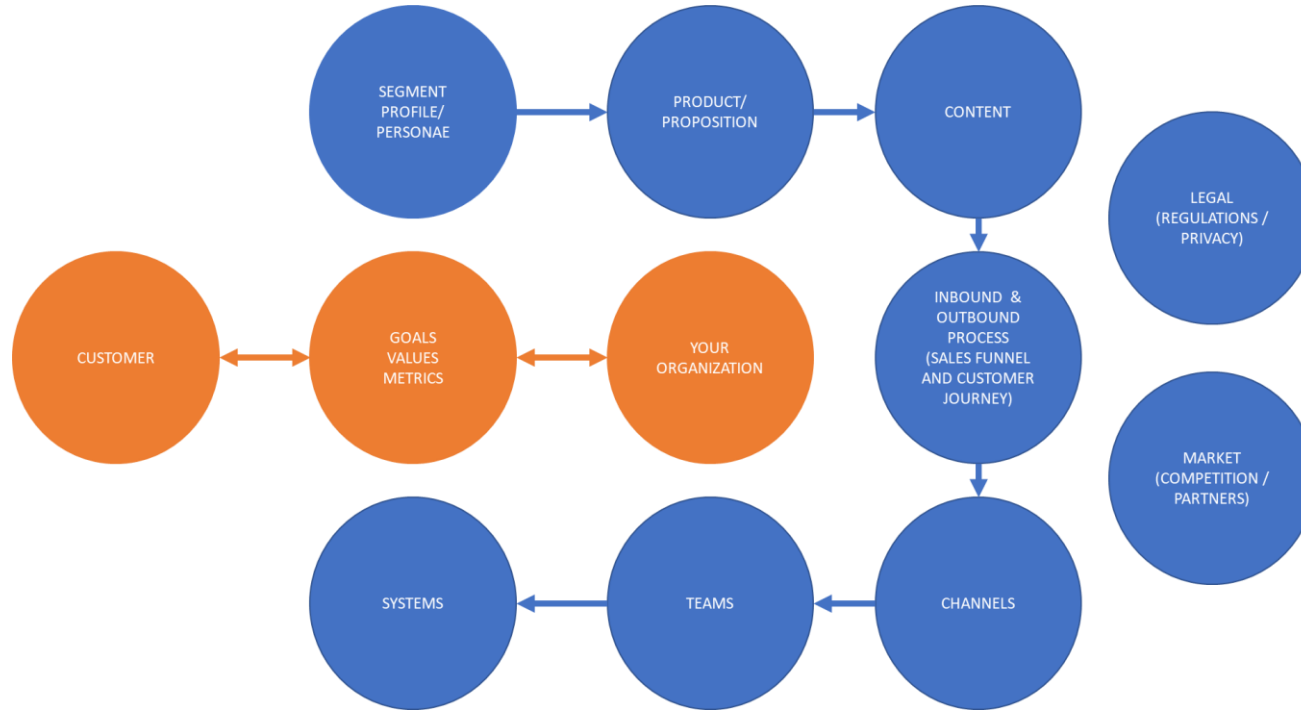
INTRODUCTION



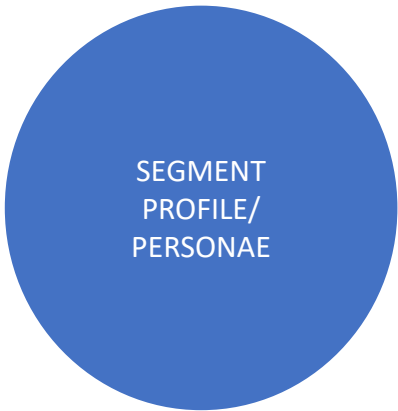
- CRM (CUSTOMER RELATIONSHIP MANAGEMENT) SUPPORTS CRITICAL BUSINESS PROCESSES, THAT IS BUSINESS PROCESSES WHERE THE ORGANIZATION MEETS ITS CUSTOMERS. THE OVERALL PURPOSE OF A COMPANY IS TO CREATE AND SERVICE A CUSTOMER.
- THE CRM STRATEGY AND GOAL SETTING THEREFORE NEEDS TO BE ALIGNED WITH BUSINESS STRATEGY AND EMBEDDED IN THE UNIQUE VALUE PROPOSITION THE ORGANIZATION SUPPLIES TO ITS MARKETS.
- MOST CRM IMPLEMENTATIONS FAIL FOR ONE REASON: THE FOCUS IS ON THE IMPLEMENTATION OF A SYSTEM. CRM IS MUCH MORE THAN THAT.
- THE FOCUS IS ON THE ALIGNMENT OF THE TOTAL ORGANIZATION TO THE CUSTOMER, CREATING THE CUSTOMER ORIENTATION. THE OBJECTIVE IS TO KEEP VALUABLE CUSTOMERS, ENGAGING THEM IN A RELATIONSHIP FOR DURABLE MUTAL BENEFIT. BY GETTING TO KNOW THE CUSTOMER, COMBINED WITH FLEXIBLE VALUE PROPOSITIONS, IT BECOMES POSSIBLE TO SATISFY INDIVIDUAL CUSTOMER NEEDS BY PERSONALISATION AND CUSTOMIZATION. RECOGNIZE THE CUSTOMER OVER ALL CONTACT POINTS AND COMMUNICATION CHANNELS, BRINGING CUSTOMER KNOWLEDGE TO THE MOMENTS-OF-TRUTH. EMPLOYEES PLAY A VERY IMPORTANT ROLE IN CREATING SATISFIED CUSTOMERS.
- CRM IS A CULTURE, AN ORGANIZATIONAL STRUCTURATION, A PROCESS VISION (STARTING AND ENDING WITH THE CUSTOMER), A METRICS MODEL, DATA AND KNOWLEDGE AND YES ALSO SUPPORT BY INFORMATIONS SYSTEMS
- THE CRM CHECKLIST HELPS YOU TO MAKE YOUR BUSINESS MODEL EXPLICIT, PROVIDING A PLATFORM FOR PRELIMINARY DISCUSSIONS ABOUT THE ROLE CRM CAN PLAY IN YOUR ORGANIZATION. IT IS THE FIRST PART OF A TWO-STEP PROCESS, AS WE SEE IT. THE CHECKLIST IS THE FIRST STEP TO SET THE CONTEXT FOR CRM. ELABORATION CAN TAKE PLACE IN A SECOND PHASE, THE USER STORY PHASE.
- PLEASE FEEL FREE TO CONTACT US WHENEVER YOU NEED SUPPORT. WE CAN HELP YOU THROUGH THE CHECKLIST IN A WORKSHOP SETTING. IN HALF-A-DAY (3-4 HRS) YOU HAVE A MORE COMPLETE PICTURE WHAT CRM CAN DO FOR YOUR BUSINESS. OUR CONTACT DETAILS ARE ON THE LAST SLIDE.



THE CRM CONTEXT STEPPING STONES



- EVERY “STONE” CAPTURES PART OF THE CONTEXT OF CRM.
- OFFCOURSE THE STEPPING STONES ARE RELATED. THEY CAN BE CONSIDERED CHAPTERS IN THE BOOK OF CRM. EACH STANDS ON ITS OWN BUT ARE RELATED IN THE TOTAL CRM STORY.
- THERE IS A NATURAL PROGRESSION IN THE FOLLOWING PAGES, BUT AS WITH EVERY JOURNEY FEEL FREE TO JUMP FORWARDS OR TO BACKTRACK.
- PUT YOUR THOUGHTS ON THE PAGE OF EACH STEPPING STONE. DO THIS IN A NON-LINEAR FASHION: WRITE DOWN KEYWORDS, USE POST-IT WITH YOUR THOUGHTS, USE VISUAL IMAGERY/SKETCHES TO CAPTURE YOUR IDEAS.

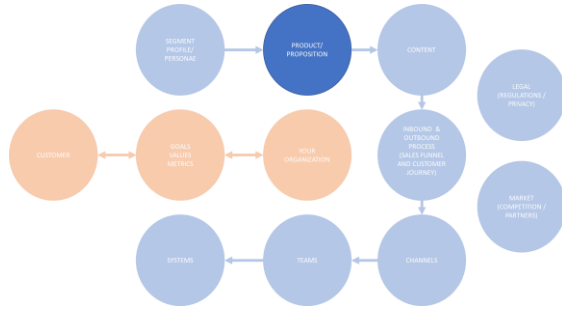


- WHO IS THE CUSTOMER ?
 - B-TO-B, B-TO-C, C-TO-C
 - HOW IS THE CUSTOMER BASE SEGMENTED
 - DEFINING CHARACTERISTICS
 - PERSONA (TYPICAL CUSTOMER PROFILES)
 - LOCAL/NATIONAL/INTERNATIONAL
 - CUSTOMER METRICS
 - LONGEVITY OF RELATIONSHIP
 - POTENTIAL VALUE
 -

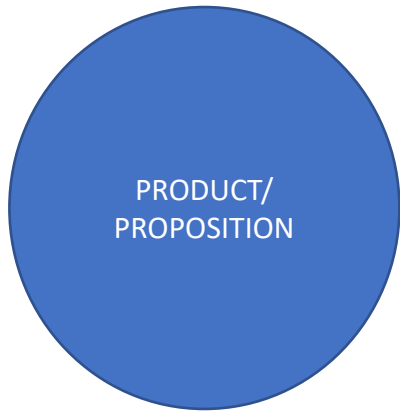


YOUR THOUGHTS



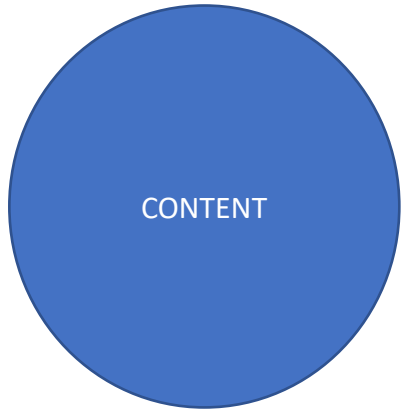
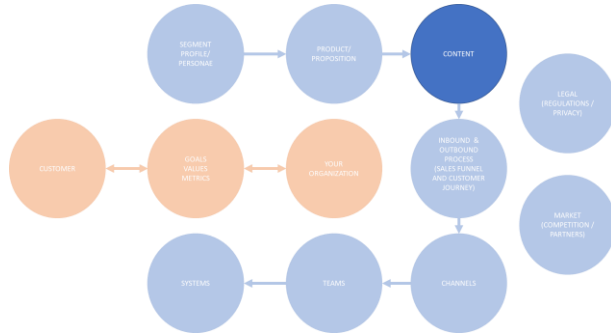


YOUR THOUGHTS



- WHAT DOES THE CUSTOMER WANT ?
- WHAT BENEFITS DOES HE SEEK (CUSTOMER VALUE)
- WHAT BASIC AND AUGMENTED NEEDS DO WE SERVE ?
- WHAT PRODUCTS/SERVICES DO WE DELIVER ?
 - IS THERE ANY SYNERGY BETWEEN PRODUCTS

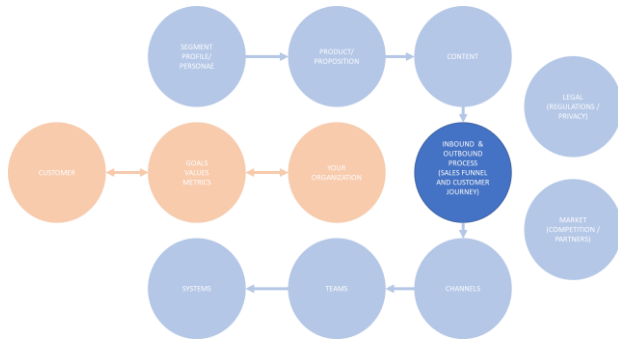




- WHAT IS THE STORY THAT WE TELL ?
- HOW DO WE HELP CUSTOMER WITHIN THEIR CHOICE PROCESS ?
- CAN OUR BASIS PROPOSITION / CORE PRODUCT BE IMPROVED BY PROVIDING CONTENT ?
 - MANUALS / INSTRUCTIONS
 - STATUS / PROGRESS
- HOW ARE CUSTOMERS QUESTIONS RESOLVED ?
 - KNOWLEDGE MANAGEMENT
- USER GENERATED CONTENT



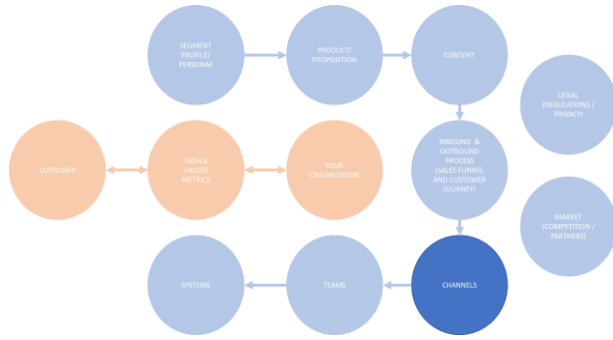
YOUR THOUGHTS



YOUR THOUGHTS

- WHAT ARE THE CUSTOMER PROCESSES ?
- HOW DOES THE CUSTOMER INTERACT WITH OUT BUSINESS ?
 - CUSTOMER EPISODES (MOMENTS-OF-TRUTH)
 - CUSTOMER JOURNEYS
 - CUSTOMER LIFE CYCLE
 - SUSPECT/PROSPECT/CUSTOMER/EX-CUSTOMER
 - ACQUISITION/CROSS-SELLING/RETENTION
 - ATTENTION/INTEREST/DECISION/ACTION
 - CAMPAIGNS / EVENTS

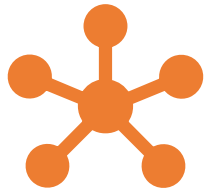
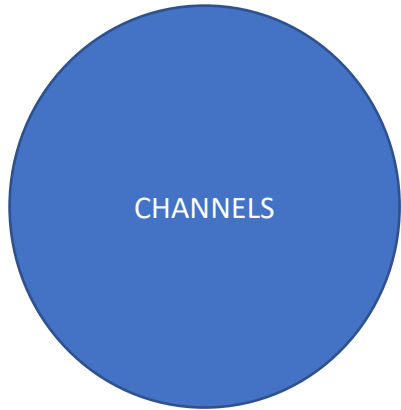


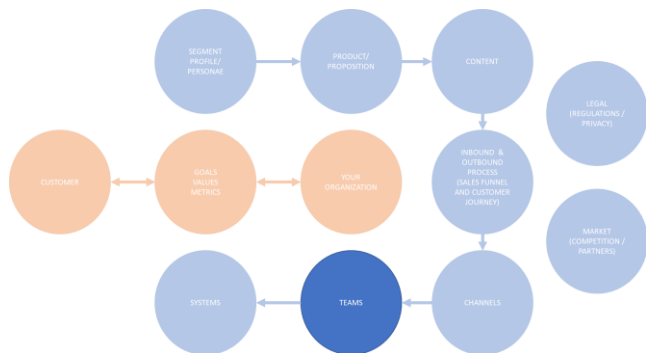


YOUR THOUGHTS

- WHAT ARE THE CONTACT POINTS/CHANNELS THAT CUSTOMERS CAN CHOOSE (#NUMBER OF CONTACTS)?

- WEB (PORTAL)
- CHAT
- PHONE/MOBILE
- SOCIAL
- E-MAIL
- MAIL
- POSTAL
- PHYSICAL



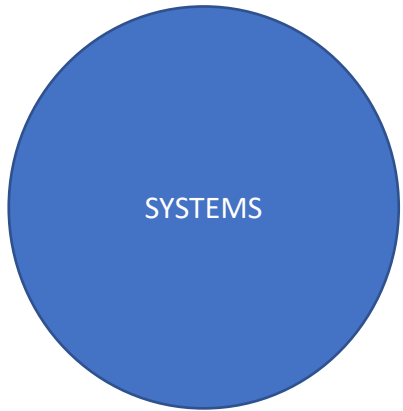
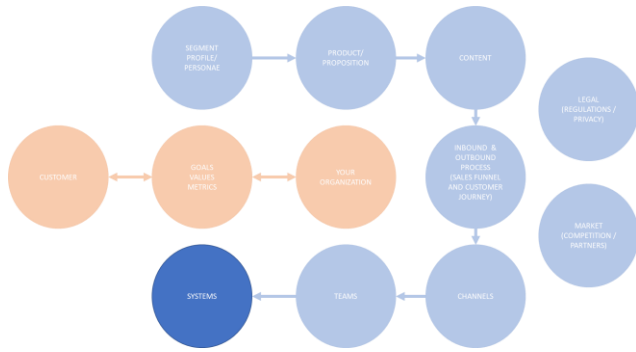


- WHICH TEAMS HAVE CONTACT WITH THE CUSTOMERS ?
 - FIRST CONTACT – SECONDARY CONTACT
 - FRONTOFFICE/BACKOFFICE
 - SKILLS / ROUTING
 - CUSTOMER POLICIES/INSTRUCTIONS/ STANDARD OPERATING PROCEDURES



YOUR THOUGHTS



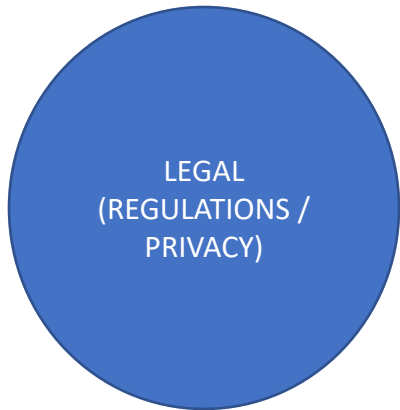
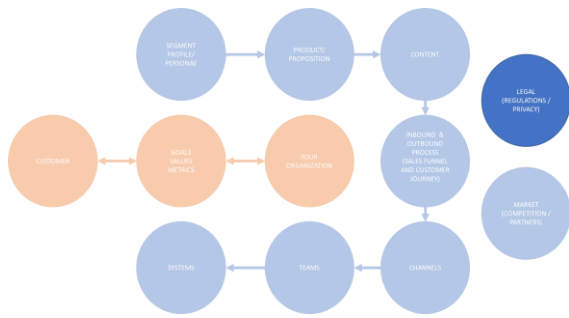


- WHICH SYSTEMS SUPPORT THE CUSTOMER PROCESSES ?
- WHERE IS INFORMATION ABOUT THE CUSTOMER BEING STORED ?
- HOW DO WE GET TO AN INTEGRAL PICTURE OF THE CUSTOMER (360)



YOUR THOUGHTS



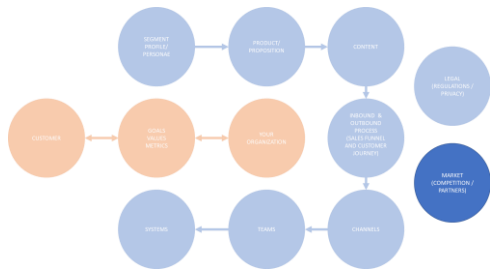


- ARE THERE ANY LEGAL ASPECTS TO OUR CUSTOMER PROCESSES ? (EG. ZORGPLICHT/KEURMERK CBF)
- WHAT IMPACT DOES CUSTOMER PRIVACY DIRECTIVES HAVE ON OUR CUSTOMER PROCESSES ?



YOUR THOUGHTS



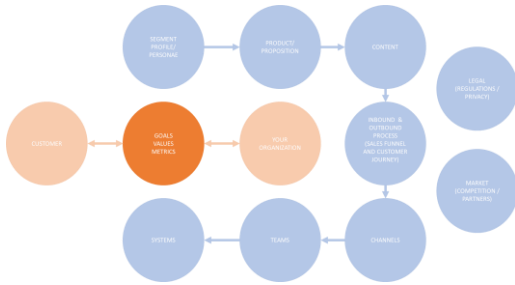


- WHAT IS THE MARKET STRUCTURE ?
 - VOLUME
 - MATURITY
 - INTENSITY
- WHAT KIND OF COMPETITION DO WE HAVE ?
- DO WE WORK WITH PARTNERS / DISTRIBUTION CHANNELS ?
- WHAT ARE OUR UNIQUE SELLING POINTS ?



YOUR THOUGHTS





- WHAT ARE OUR OBJECTIVES ?
- WHAT ARE OUR BRAND VALUES ?
- WHAT ARE THE CUSTOMER OBJECTIVES ?
- HOW DO WE MEASURE RESULTS ?
 - RFM
 - CUSTOMER VALUE
 - CUSTOMER SATISFACTION
 - CUSTOMERS' SHARE OF WALLET
 - NPS



YOUR THOUGHTS

