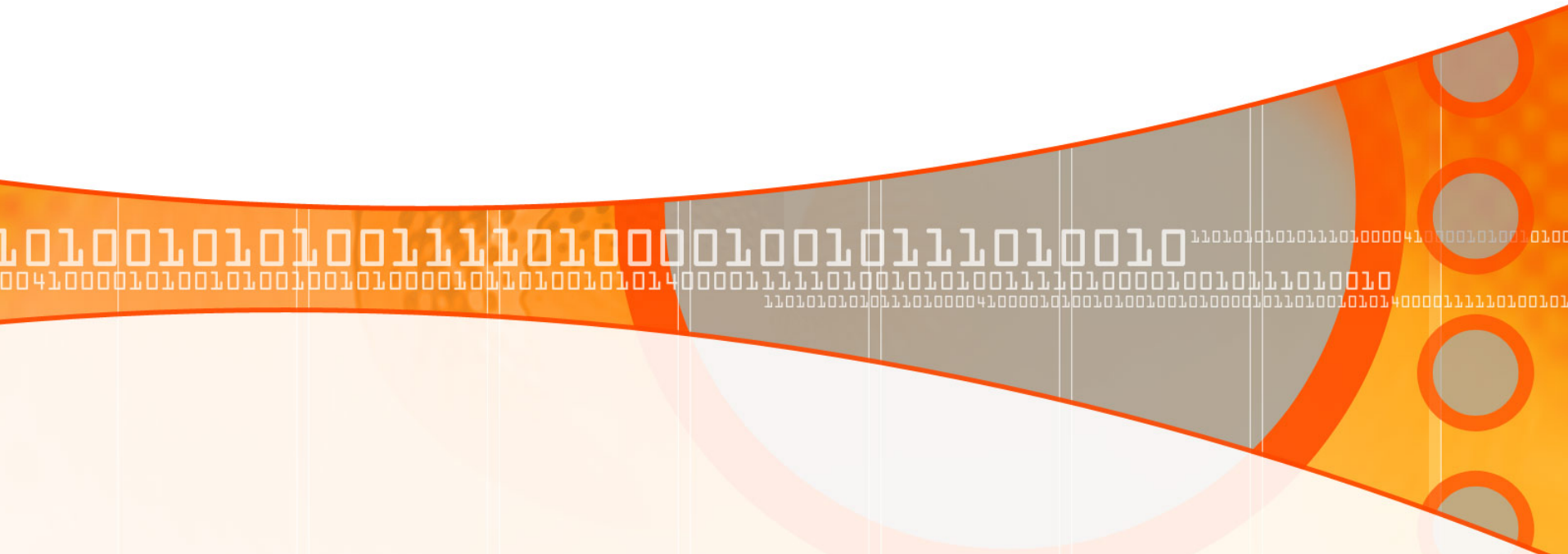




# Solving the CRM Puzzle

*CRM implementations from a fulfillment perspective*



# CRM - What the Heck is it?

*Customer relationship management (CRM) encompasses the capabilities, methodologies, and technologies that support an enterprise in managing customer relationships. The general purpose of CRM is to enable organizations to better manage their customers through the introduction of reliable systems, processes and procedures.. The system must be efficient and it must integrate into rational work processes as seamlessly as possible.*

*Good definition. Good concept. How do we make it happen?*

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# CRM – How do I get one of those?

- *Convince yourself you need one first. It's not for everyone.*
- *Convince management next.*
- *A successful CRM strategy cannot be implemented by simply installing and integrating a software package and it will not happen over night. Changes must occur at many levels including policies and processes, customer service, employee training, marketing, systems and information management.*

# Possible solutions to pursue

- 1) *Integrate CRM functionality with day-to-day order process database. (\$\$)*
- 2) *Have Fulfillment databases “feed” a centralized read-only Uber database. (\$\$\$)*
- 3) *Keep existing order processing and fulfillment system and download data and analyze it using off the shelf software. (\$)*
- 4) *Create Multiple systems and multiple databases and integrate them. (\$\$\$\$)*

# 1) day-to-day database

## Upside

*Data is current and real.*

*Avoid duplicate databases.*

*Can be cost-effective (\$\$).*

## Downside

*Can be more complex - ways to reduce this.*

*Need more computing horsepower to create views and aggregate data without impacting production resources.*

*Current Fulfillment partner may not have the personnel and/or system resources to devote.*

*Your current fulfillment provider doesn't maintain all of your process/order data*

# Day-to-day database - Tips

*Talk to Fulfillment Partner.*

*Make sure the CRM database doesn't complicate your order processing.*

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# Create the Uber Database

## Upside

- No need to change any order processes.*
- Relatively easy to create a data-dump file.*
- Possibility to buy canned software and import data.*

## Downside

- Data is not current and real.*
- You can't update. You have to go to the original source system to make changes.*
- Two copies that can get out of synch.*
- Can be more complex - ways to reduce this.*
- Can be resource intensive (computer hardware)*
- Any updates have to be made back on the day-to-day database.*
- Be careful that fields are translated properly.*
- Data structure may be fundamentally different and some meaningful data may be lost besides best effort*

# Create the Uber Database - Tips

- *Automate the data upload and schedule as frequently as possible.*
- *Run it overnight so you have freshly rebuilt views during the day.*

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# CRM for do-it-yourselfers

## Upside

*Can be more complex ways to reduce this.*

*Need more computing horsepower to create views and aggregate data without impacting production resources.*

*Current Fulfillment partner may not have the personnel and/or system resources to devote.*

*Your current fulfillment provider doesn't maintain all of your process/order data.*

## Downside

*You have to know how to operate the CRM software.*

*Two copies that can get out of synch Can be more complex – ways to reduce this.*

*Can be distracting and expensive if you will not get any addl. Personnel resources. (Your time is valuable!).*

*Level of Sophistication may not match other solutions.*

# CRM for do-it-yourselfers - Tips

*Evaluate your needs for CRM.*

*Ask others with the same resources what they've pursued.*

*Consider a Co-op.*

*Make sure the CRM database doesn't complicate your order processing.*

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# Multiple systems, structures, aspirin.

## Upside

*Data is current and real*

*Will enable you to connect disparate systems*

*Can be cost-effective if expense to change existing systems*

*Your current fulfillment partner can help since they understand your business rules and data.*

*Other partners can utilize existing structure*

## Downside

*You have to know how to operate the CRM software.*

*Two copies that can get out of synch. Unless a full checkpoint refresh can be done.*

*Technical Expertise and time to test and implement.*

# Multiple systems, structures, aspirin - tips

*This solution makes the most sense when*

- 1) You have to connect two entrenched systems.*
- 2) You have to keep them real-time.*

*Otherwise it's not recommended.*

*Pay special attention to error-handling. It's harder in this scenario to elegantly "back-out".*

# Take Aways

*Meet with end users to determine their requirements. Continually involve them throughout the process.*

*If you are pursuing an option that involves new order processing and fulfillment business rules make sure that the people that are doing this have experience. If they don't then make sure that your end users have a strong say in the design.*

*Beware of pretty flowcharts and state change diagrams that oversimplify processes.*

*Do not settle for error handling along the lines of "an email will be sent to an administrator". This tells someone that an error has occurred, but has not addressed how it will be solved. Pursuing this question will often result in the exposing of poor system design as the "error processing" will be handled by a work-around. The developers should sit with your order entry people and understand how you process. You don't want to have to hire people with a PHD in data-entry to do your order processing.*

# More Take Aways

*Make sure that if any non-industry person has any significant impact on the project that they understand circulation and fulfillment. Take the time to explain what a renewal is and why it's important.*

*Be careful of outside consultants that do not have fulfillment experience. They will be learning fulfillment on your dime. If you can have two consultants great. If you can only have one, try hard to get one with circulation experience. Beware of the web developers who think they can quickly learn circulation.*

*Worry about the reporting. Too many times it's an afterthought to making pretty web pages. I've seen a project where there was no order date and no record of who did the transaction. How were they going to generate reports?*

*Most fulfillment houses already have reports that are reliable, why reinvent the wheel?*

*The trick is to do it where you don't create a system that requires a disproportionate amount of effort in relation to the results.*

*Data integrity is key. Analysis will be useless without good data.*

# The Road Ahead

- *Which way is best for you? - A few options –*
- *Talk to your in-house technical staff*
- *Hire a consultant to help.*
- *Talk to your fulfillment house about their capabilities. Many have qualified technical staff, knowledge of your product and would welcome the opportunity.*

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## Thanks!

