

### Customer Knowledge

Clients – Segmentation model and definition of “profitable” long-term customers.

Customer Life Cycle – Definition of customer lifecycle (engage, transact, fulfill, serve) and desired customer experience.

Brand, Products, Services, Channels – Products/services and go-to-market model.

### Operations

KPI, Metrics – Expected P&L impacts from CRM initiatives and defined measurements.

Execution Processes – Processes and scorecards used to manage CRM process execution.

Marketing, Sales & Service Processes – Key processes and their current complexity.

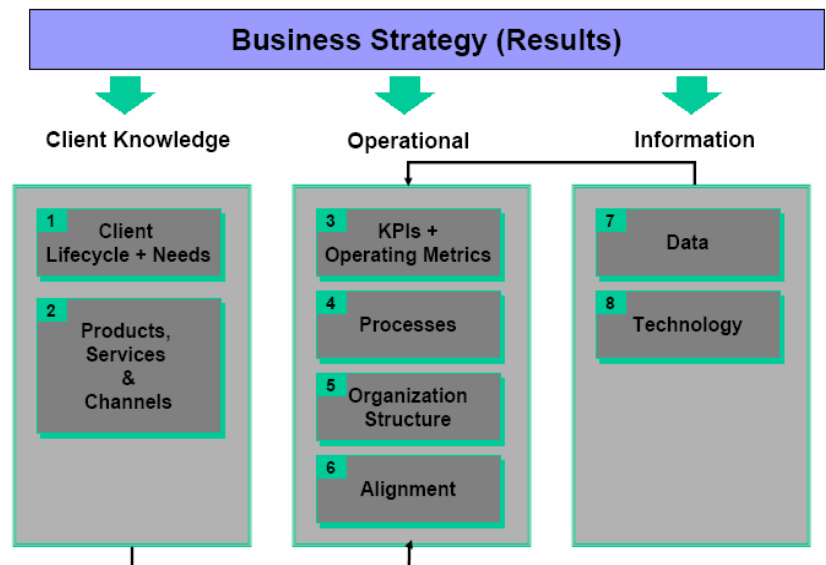
Organization and Communication – Change management model, approach and current status.

### Information

Data Quality - Current state of data and processes to ensure quality data.

Interactive, Operational & Analytic – Critical functionality required for supporting CRM initiatives.

CRM Integration – Integration required to support common view of customers and the operation.

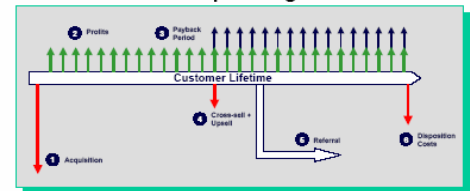


## Translating customers to profits

### Competitive Model



### Profitable Operating Model



What should a company emphasize?

<b>1 Acquisition</b> Revenue ↳ Installation ↳ Setup fees Expense ↳ Marketing ↳ Commissions ↳ Provisioning costs ↳ Order management	<b>2 Profit</b> Revenue ↳ Per user/service Expense ↳ Billing ↳ Loyalty programs ↳ Ongoing service costs	<b>3 Payback Period</b> Breakeven period when profits offset initial customer acquisition cost	<b>4 Cross-sell + Upsell</b> Revenue ↳ Service revenue Expense ↳ Campaign costs ↳ Order management ↳ Ongoing service costs	<b>5 Referral</b> Revenue ↳ Additional LTV of new customers Expense ↳ Referral program costs ↳ Commissions/rewards	<b>6 Disposition &amp; Retention Costs</b> Expense ↳ Final billing ↳ Account inactivation costs ↳ Other administrative costs
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# CRM Strategy and Alignment

One Week • Three Weeks • Five Weeks Engagements

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