CRM Workshop

Achieving clarity in
CRM initiatives

Solvis Consulting, LLC

The Challenge • Achieving "Big Picture" Clarity

Many companies begin their customer initiatives by addressing a specific need – improving customer service, making sales more effective, segmenting their customer base…the list goes on and on. Yet, as companies progress with these initiatives, they quickly confront the reality – the pieces all integrate!

Sales people depend on high client satisfaction, marketing needs the information captured by the sales force, customer service relies on operations to meet client expectations. While the sales, marketing and customer service functions each have their own challenges, they share the common challenge of achieving clarity regarding the customer and their needs.

This typicallyy represents the next step in a company's CRM evolution – moving from a departmental view targeting process efficiency to an enterprise focus centered around customer needs. Meeting this challenge requires that executives transcend the needs of their individual functions and take a broader company view as seen through the customer's eyes. This process begins with a healthy dialog amongst the key constituents responsible for interactions with customers.

The Solution • CRM Workshop

This is the challenge addressed by the CRM Workshop – how to elevate CRM discussions to the executive level thereby bringing a clearer picture of CRM priorities and objectives. The CRM workshop begins by establishing a common point of reference regarding CRM terms and concepts. It helps companies achieve clarity regarding what is important and where they should focus their CRM investments.

Ask yourself:

- Do we truly understand our customers, their needs and how we serve them?
- Do we understand the opportunity represented by CRM?
- Is our team on the same page regarding what needs to be done?
- Do we understand the areas representing the greatest CRM opportunities for our company?
- Do the critical process and business owners agree with the overall direction and agree to support the CRM initiatives?

If the answer to any of these questions is no, then your company should consider conducting a CRM workshop.

Workshop Objectives

1. Develop a shared view of CRM objectives in the context of supporting a client's overall business strategy.

2. Develop consensus at the executive level regarding CRM priorities, opportunities and areas warranting further investigation.

Workshop Overview

The workshop takes place over a four-day timeframe with heavy client interaction on the third day, the Workshop Day. A workshop leader and scribe are actively engaged throughout the entire process:

Day 1 – Discovery Day
The workshop team confers with the client to gain a greater perspective regarding the existing CRM initiatives and CRM environment. This information gathering allows the team to conduct richer discussions during the Workshop Day.

Day 2 – Preparation Day
The workshop team prepares materials reflecting the information gathered from the Discovery Day. The workshop team adjusts workshop questionnaires and the agenda and produces workshop materials. Final logistics are completed.

Day 3 – Workshop Day
The workshop team together with the client's executive team conducts the workshop. A workshop leader facilitates the session while a scribe captures the information reviewed during the discussions.

Day 4 – Documentation and Presentation Day
The team finalizes the presentation document and captures key findings. The team then presents this information to the client's executive team outlining key opportunity areas and suggested priorities.

Workshop Topics

Four sessions assess the degree of maturity and consensus in key CRM areas. The team reviews each area with the goal of quickly achieving high-level consensus regarding current maturity levels and determining the opportunities that exist. The four topics are:

1) CRM Strategy
This session reviews the business strategy and its implications on CRM strategy. It determines if a common understanding exists regarding questions such as:

- What are the CRM objectives in light of the company's strategy?
- What is the current CRM emphasis (growth, retention, cost of service)?

Workshop Topics (continued)

2) Customer Definition
This session ascertains how the company views its customer base in terms of segmentation and the products and services it offers. It examines areas such as the degree of customer differentiation and the availability of customer knowledge. It determines the answers to questions such as:

- Who do we consider to be a customer?
- How much do we know about our customers?
- Do we know the customer's value and their customer lifecycle?
- Are customers differentiated in terms of their profitability and the services offered?

3) Operational Model
This session divides the operational model into two components: 1) the sales, marketing and customer service processes, 2) the execution processes and metrics maintaining focus on customer needs.

The team reviews key sales, marketing and customer service processes determining the current level of maturity, the customer-centricity of the processes and their level of integration. The team also reviews the processes and metrics used to manage the day-to-day execution of the CRM processes.

Questions addressed in this session include:
- How mature are existing customer-focused processes?
- What level of integration exists between each of the areas? Does a common view and understanding of customers exist?
- How sophisticated are the execution processes maintaining focus on customers and are they rigorously applied?
- What change management programs are needed to address the new CRM initiatives within the organization?

4) Technology
This session covers the technology infrastructure supporting the aforementioned areas. The team reviews the overall architecture including the interactive, operational and analytical areas of CRM. The team also reviews the accessibility, accuracy and availability of data.

Questions addressed in this session include:

- Is the data required to execute CRM processes available, accessible and accurate?
- Does a centralized database exist for tracking customer information?
- Do systems enable customer-facing personnel to be aware of customer interactions?

Attendees

Role	Name
‣ President ‣ XVP of Sales & Marketing ‣ XVP of Customer Service ‣ CIO/VP of IT ‣ Key P&L Owners ‣ Project Sponsors	‣ ‣ ‣ ‣ ‣

Deliverables

The key deliverable from this process is the shared understanding of CRM priorities developed across the client's executive team. The workshop team also produces a presentation document capturing key discussion points uncovered during the workshop. This document covers:

1. Key findings across four areas:
   - CRM Business Strategy
   - Customer Definition
   - Operations
   - Technology

2. Review of high-level opportunity areas.

Workshop Requirements

The following items are required for the workshop:

- Conference room with seating space for the above attendees
- Flip charts and markers (multiple colors)
- Catered breakfast/lunch
- Refreshments
- Telephone facilities (for breaks)

CRM Workshop Agenda

Topics	Time
1. Introduction/Baseline	8:00 – 9:45 a.m.
a) *CRM Principles* – Common definitions	
b) Review company business strategy and CRM implications.	
2. Break	9:45 – 10:00 a.m.
3. Customer Definition	10:00 a.m. – 12:00 p.m.
a) *Clients* – Segmentation model and definition of "profitable" long-term customers.	
b) *Customer Life Cycle* – Definition of customer lifecycle (engage, transact, fulfill, serve) and desired customer experience.	
c) *Brand, Products, Services, Channels* – Products/services and go-to-market model.	
4. Lunch	12:00 – 1:00 p.m.
5. Operations	1:00 – 3:00 p.m.
a) *KPI, Metrics* – Expected P&L impacts from CRM initiatives and defined measurements.	
b) *Execution Processes* – Processes and scorecards used to manage CRM process execution.	
c) *Marketing, Sales & Service Processes* – Key processes and their current complexity.	
d) *Organization and Communication* – Change management model, approach and current status.	
6. Break	3:00 – 3:15 p.m.
7. Technology	3:15 – 5:00 p.m.
a) *Data Quality* - Current state of data and processes to ensure quality data.	
b) *Interactive, Operational & Analytic* – Critical functionality required for supporting CRM initiatives.	
c) *CRM Integration* – Integration required to support common view of customers and the operation.	
8. Wrap-Up	

About Solvis Consulting, LLC

Solvis Consulting LLC is a consulting and systems integration firm specializing in demand generation and customer loyalty initiatives. We help clients measurably increase the value they get from customer-driven technology investments. We do this by combining a passion for measurement with operational know-how and technology expertise. We believe these represent the key ingredients essential to delivering spectacular results.

Based in South Florida, Solvis brings targeted expertise to client engagements, acting as a Trusted Advisor for customer-related initiatives. Each of our seasoned consultants typically brings over 15 years of experience gained at leading consulting firms such as Accenture, EDS and Cambridge Technology Partners and past experiences serving clients such as BellSouth International, Citibank and Ryder. Our team also brings unique capabilities in serving the needs of companies with operations spanning the Americas.

Through a unique partnering model, we provide customers with the independent voice they seek on their initiatives while offering specialized expertise in select software packages through a network of partners. This allows us to do what is right for customers without a bias towards a specific software solution.

If you would like further information regarding Solvis Consulting, LLC, please contact Jesus Hoyos, at 954-684-0274.