

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.

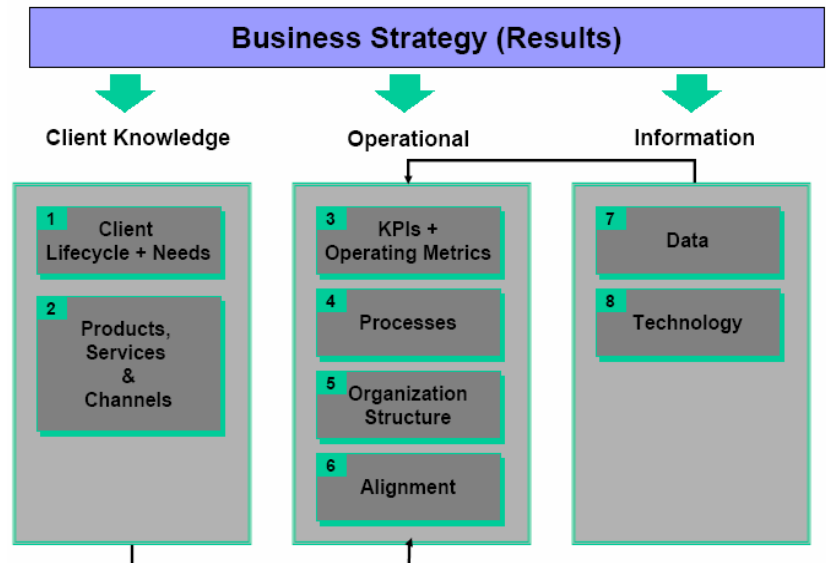
Organization and Communication – Change management model, approach and current status.

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.

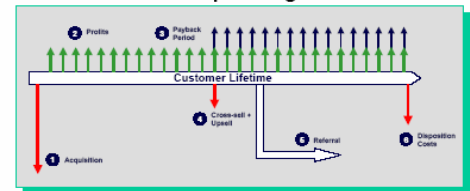


Translating customers to profits

Competitive Model



Profitable Operating Model



What should a company emphasize?

<p>1 Acquisition</p> <ul style="list-style-type: none"> Revenue Installation Setup fees Expense Marketing Commissions Provisioning costs Order management 	<p>2 Profit</p> <ul style="list-style-type: none"> Revenue Per user/service Expense Billing Loyalty programs Ongoing service costs 	<p>3 Payback Period</p> <p>Breakeven period when profits offset initial customer acquisition cost</p>	<p>4 Cross-sell + Upsell</p> <ul style="list-style-type: none"> Revenue Service revenue Expense Campaign costs Order management Ongoing service costs 	<p>5 Referral</p> <ul style="list-style-type: none"> Revenue Additional LTV of new customers Expense Referral program costs Commissions/rewards 	<p>6 Disposition & Retention Costs</p> <ul style="list-style-type: none"> 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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