



# CRM implementation guide

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# INTRODUCTION

Have you ever asked yourself whether it is important or necessary to build positive relationships with your customers?

Obviously not! Everyone agrees on the fact that this is an essential part of running a successful business.

However, there are few customers that experience a positive purchase or after sales service...

Many businesses have the right ambition to provide a pleasant experience but often fail because of malfunctioning internal procedures or lacking the right tools.

Yet, restoring trust after a negative experience requires you to have a relationship in the first place.

With how many of your customers do you truly have a trustful relationship (customer intimacy)? The kind of relationship where a customer blindly trusts your advice, pricing and quality of products or services?

And how do you combine that with your heavy workload?

## CUSTOMER-CENTRICITY

Customer-centricity is a mindset or a vision on how to engage with your customers by putting your customers first. This means it is often part of a business strategy that is translated into:

- 1) **Company Culture:** How we want our employees to behave in order to put our customers first.
- 2) **Business procedures:** How to be organized internally and control the quality of our products and services. Typically, this is related to marketing, sales, customer service... but also through your different channels of engagement (web, social, point of sale, personal ...)
- 3) **Tools:** Business solutions that will be used to support the business processes such as e-commerce, marketing automation, customer data platforms but also CRM.

Beyond a “simple” customer focus, adopting a customer-centric approach in your organization, generates the longest lasting business value.

Nowadays it is even so that successful customer-centric companies have set the scene for other companies and customers have sky-high expectations.

At Cegeka, we believe that customer-centricity should relate back to people in general.



## VISION CEGEKA

People – as in: consumers, citizens, office workers – are taking center stage. They all want to be served in a way which is highly tailored and as free of friction as possible. They don't want technology, they want seamlessness, safety and speed rolled into one, and they want it anyplace, anytime.

# CUSTOMER ENGAGEMENT

There is no such thing as a “CRM-solution” anymore. Historically, CRM has been a business application, with a strong focus on sales, to manage all relationships and interactions with customers.

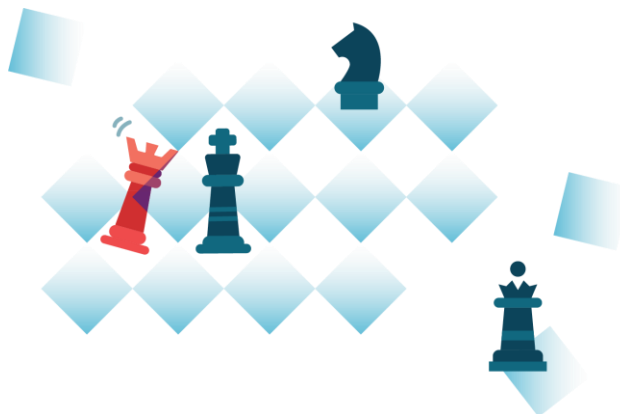
But more and more we see that heavy workloads force us to automate specific processes.

This is what is referred to as digitalization or the digital transformation.

As a result, we now also require tools that help us to better communicate and collaborate, internally and with our customers.

To truly set yourself apart and offer a personal approach, your marketing, sales, customer service departments need to be able to track customer behavior and exchange information easily.

It is no longer possible to implement a one-fits-all-solution. It is crucial to put the focus on the right business needs. Therefore, instead of CRM we speak about customer engagement and we have a broad range of consulting services and supporting solutions.



## MARKETING AUTOMATION

Marketing automation is software that assists marketers with customer segmentation, customer data management and campaign management. It provides marketers with the ability to offer real-time, targeted, data-driven campaigns along with enhanced efficiency and productivity.

## SALES FORCE AUTOMATION

Sales force automation (SFA) tools are systems that support the automation of sales activities, processes and administrative responsibilities for organizations' sales professionals. It is considered to be a foundational technology, implemented to automate an organization's core sales processes.

## OMNICHANNEL CUSTOMER SERVICE

With omnichannel customer service software you provide the ability to orchestrate customer requests with assisted service, as well as with self-service. Resource management is also often required to schedule the right resources to solve customer requests.

## FIELD SERVICE MANAGEMENT

Field service management (FSM) is a discrete market within the broader customer service and support software market. Field service providers (FSPs) typically dispatch technicians to remote locations to provide installation, repair or maintenance services for equipment or systems. They may manage, maintain and monitor these assets under a predefined service or maintenance contract.

## CUSTOMER PORTALS

Engage with customers by giving them secure access to your company data either anonymously or through commercial authentication and allow users to submit their information.

# WHERE TO START

## WHY ARE WE HERE?

Start with your definition of customer-centricity. Ask yourself the following questions:

- What does it mean for us, as an organization, to be customer-centric?
- Why do we do what we do? Why do we exist?



Being customer-centric often also means to be authentic. The best advice that we can give is to make a definition of customer-centricity for your organization based on your value proposition. Basically, a value proposition answers 2 questions:

- What are the pains of my (potential) customers?
- How can we solve them with unique products or services?

Based on this, you can design your customer engagement process in order to manage your customer expectations in the various phases of the engagement process, the touchpoints and channels.

## HOW DO WE WANT TO ACHIEVE THIS?

From here, we can anticipate on customer expectations by formulating clear procedures and deliverables that should be formulated into SMART business objectives: Specific, Measurable, Achievable, Realistic and Time Related.

Based on these objectives we can proceed to plan ahead and think about how we want to reach those objectives.

## WHAT DO WE NEED?

With regards to customer-centricity, reaching your business objectives is about adopting new ways of working and behavior. Often, we also need the right tools to support you with that.

And this is when the decision for the right solution comes to play. If you have clear objectives, you can evaluate what type of solutions you need.

The following questions can help you:

- Do I need a solution that provides feedback to customer requests in **real-time**?
- Should I offer functionality through **different channels** (web, mobile...)
- Do I want to generate a **unique** experience?
- Do I have qualitative **historical data**?

For standard business processes and to facilitate operational efficiency or compliance you can perfectly go for a standard solution and trust your implementation partner to bring its best practices to the table.

In case of business-critical processes or solutions that can provide you a competitive advantage, it is worth exploring what is technologically possible. Explain to your implementation partner what your business goals are and define an innovative roadmap together.

# COMMON MISTAKES

## SKIPPING THE BUSINESS ANALYSIS

Many companies have had a bad experience in the past with business analyses. It has often been costly and didn't have any return on investment. Yet it is a crucial step that doesn't require extensive discussions. A business analysis can be tackled with a pragmatic approach with tangible results.

How can you be successful if you don't have clear objectives and if you don't attach measurements to the objectives?

## SOLUTION TUNNEL VISION

As an implementation partner we often receive RFIs, RFPs, RFQs where the requirements and solution description is often outdated or incorrect. Try to level with your implementation partner and dare to explore suggested alternative solutions.

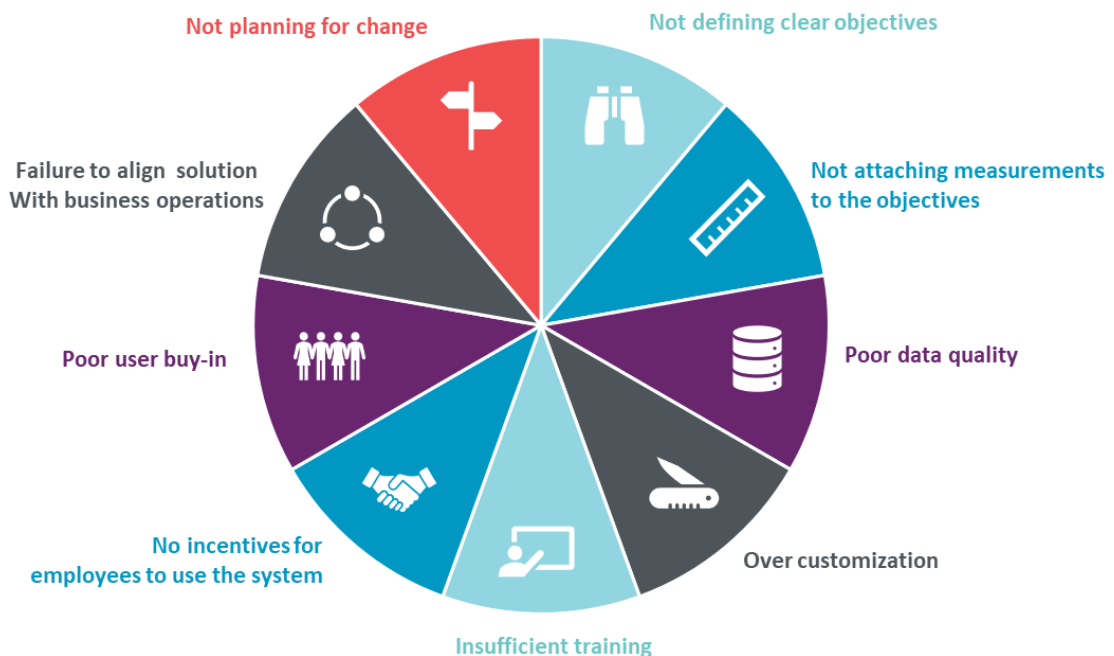
## DECIDING ON PAST EXPERIENCE

Often there is a strong preference towards a specific brand or technology based on past experiences. Technology however evolves at a very high pace. Make sure to explore the latest features and technological evolution of solutions.

## CHANGE MANAGEMENT

The following dimensions are often forgotten when implementing a new change: people, process and methodologies.

Often the focus is too much on a technological solution with its costs and deadlines that we forget to prepare our business for the new change. The adoption part of a solution is crucial and starts at the beginning of the implementation project. Not when the solutions is being released.



# KEYS TO SUCCESS

## IDEATE

When implementing a new solution, make sure to ideate to come to the best possible approach. Ask your implementation partner to inspire you with relevant business cases and (innovative) technological trends.

Make sure to share and discuss your business context for your implementation partner to understand your current business pains and requirements for a future solution.

Ask your implementation partner to challenge you and design a clear implementation plan.

Explore if there is a fit between you and an implementation partner by having in depth discussions. A proof-of-concept can also be very beneficial to experience what a collaboration might look like.

## APPROACH

Key to a successful implementation is, obviously, also the approach.

Traditionally, software development happened using a linear and sequential approach. Nowadays we have learned that working with a more incremental or agile methodology can be much more beneficial. Agile methodologies approach projects by discovering requirements and developing solutions through the collaborative effort of self-organizing and cross-functional teams. This can also require a more intensive investment of your own time in a project.

Find an implementation partner that can clearly explain the implementation approach with a clear plan and tangible examples of deliverables. Also find an implementation partner that is willing to tailor its approach to your needs.

## SCOPE

Be careful with hidden costs! Make sure to fully scope your project. From a budget perspective make sure not to focus on functional requirements only. Make sure to also clearly identify non-functional and transition requirements. A well-defined scope should also touch on organizational aspects, IT hardware and software prerequisites, risks ...

## CHANGE MANAGEMENT

Change Managements activities are used to prepare, support, and help individuals, teams, and organizations in making organizational change. For solutions such as a CRM, the adoption of the new tool requires buy-in from its end users. Registering and sharing information can be perceived as additional administrative work or end users can have the fear to be micro-managed.

Prepare for your change by preparing a well-defined change plan.

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*Let's have a coffee*

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