



CRM TECHNOLOGY

by Harry Sheff & Keith Dawson

It's a CRM Bonanza



The industry's experts talk turkey about why it works, why you need it, and where this toolset is going.

CRM means different things to different people. Since it first burst on the scene in 1997, burning with the heat of a thousand suns, it has changed quite a bit. Call center practitioners have gotten used to managing the complex deployments, the changing data sets and the new rules for call flow that CRM brings.

At heart, CRM tries to do one thing: bring accurate and relevant information about customers to the agent's desktop. There's no question that ten years into its development as software, it can accomplish this task with gusto. It's part of the need-to-have equipment in a modern call center.

After several years of retrenchment among CRM vendors, the

tools on the market today are a far cry from those brave attempts ten years ago to amalgamate customer data. As often as not, you can get a CRM system that's hosted, or on-demand. Just as important, CRM is a dynamic part of managing the customer experience — hooked into other tools for assessing quality, measuring satisfaction, training reps and more.

Given all the changes, we went in search of insight into what CRM means today. We asked many of the experts at companies that make CRM software where they think this complex toolset is headed, and what it means for today's call centers.

"Customer Relationship Management" is a vague term. How

do you define it relative to your product?

Greg Anderson, FrontRange: The term is vague because it means something different to each vertical market and typically to each business within that vertical. Because of such we are focused on providing tools that can help firms solve their business issues by having solutions that can be configured to work the way you want to work. In other words, our product adapts to a company's workflow and allows automation of many CRM processes. By doing such, you reduce your training costs and increase user adoption of the CRM system, which enables you to achieve a return on your investment. The bottom line is that CRM helps you

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develop a "corporate memory" about all your customers, so that you can serve them consistently and remember the issues that are important to each customer. Ideally, everyone in a company references a CRM system so they are on the same page and work as a stronger team to serve the customer. In turn, customers see this professionalism and stick with companies that treat them this way.

Maria Miller, TechExcel: To us, CRM is the complete lifecycle of a customer — from the initial investigations to the needs assessment — to service and beyond. Everything that occurs throughout that relationship must be based on knowledge; whether it's inferred or gained — and fed back into the enterprise. Only by having a CRM system that is knowledge-centric will an enterprise have complete visibility and be able to act appropriately on that information. That's why we've developed TechExcel Service Suite to be a complete CRM system that includes initial customer acquisition in MarketingWise, through account management in SalesWise, through internal and external support in ServiceWise (the old HelpDesk) and AssetTrack.

Marchai Bruchey, KANA: The first Customer Relationship Management systems focused on the business — helping organizations better manage their customer data. However, as the times changed, so too did the purpose and definition of CRM. Today the focus is on the customer — improving the customer experience in order to cultivate long-term customer relationships and loyalty. CRM and customer service software improves the customer experience by optimizing their interactions across multiple channels —

phone, e-mail, chat, and the Web. Moreover, the goal of CRM has evolved along with the technology, going from assisted service to self-service and now we're in the midst of a shift to proactive service. It's no longer enough to simply respond to customers' needs; businesses today are leveraging technology like KANA's to anticipate those needs before the customer even asks, resulting in happier and more loyal customers.

Kris Brannock, Vertical Solutions, Inc. (VSI): To VSI, Customer Relationship Management, is not technology, and it's not processes. CRM means that we assist our customers in creating and maintaining a positive experience for each of their clients. We offer technology to help enhance that experience by putting the right data in front of the right person at the right time. We offer an application portal view that enables each agent, rep, manager and executive, a view of the data that is most important to them with current requests, historical requests and statistics, that can be expanded or collapsed depending on which data is necessary and pertinent to that particular individual. The majority of the data comes from our PowerHelp CRM application, but often times, our customers also integrate information such as order entry data, inventory status, etc. so that they have a centralized view of every customer touch point.

A cranky industry pundit once said that "if your idea of CRM consists of putting customer data on an agent's desktop — and doesn't go any farther — then you are mismanaging that relationship." What do you think of that?

Mark Woollen, Oracle: I think

that's a very provocative — but also a very timely — statement to be making. What I think is interesting about his observation and his statement, is it somewhat reflects where a lot of companies have found themselves anywhere in the last 24 months. There were a number of companies that invested in CRM, I would say just in the mid to late '90s, with a very focused, deliberate outlook about what they wanted to accomplish. You started to see companies realize that 'there's something here that I'm not doing — I need to do this to be competitive with my peer group and my industry.' It's like a land-rush all of sudden — I can't not invest in this. But they invested, to a certain extent, without a lot of forethought and planning and, I would also suggest, executive ownership and buy-in that's a critical part of making these initiatives successful. And in about 2004, you found these companies finally realizing: 'I bought this software; wow! That's what it takes to get it to work. I've got it to work now.' And they have it working in much the sense that [the pundit] referenced. It now works, I can take calls about customers, I

can enter data into this wonderful data model that sits on top of this database that characterizes my customer interactions — that's wonderful. However, now that these companies have figured that out, that they've digested these investments, and have actually implemented these first generation CRM business processes in their enterprise — now is when you can really start to get more value out of that basic investment. That's when you can basically start to go ahead and, number one, take your CRM investment and actually extend it beyond the firewall.

Don't be afraid to think about re-using business processes that you've invested in, say, your field salesforce, or your customer service organization that sits in a call center, look at which one of those you can intelligently leverage out on the website for your customers, for your partners. So you can interact with them more efficiently and in a more intimate manner and a more focused manner, directly. It's all well and good to operationalize CRM. Get it out there, start using it, incorporate it into your DNA, understand your customer interac-

tions. But if all you do is have forms on a database, and enter in customer data, and call it a day, you're missing a huge opportunity in terms of what you can leverage from that customer data, the intelligence represented in that data, and, number one, if you just think of intelligence as something you slice and dice, and you use it to develop more intelligent marketing offers, that's good, that's a great first step in terms of leveraging that customer data. But if you can then go ahead and leverage these real-time decisions and actually operationalize that in real time, that's even better. So this is all about making these CRM systems more than just operational. It's about making them what I would call real-time systems. Intelligent systems that actually go ahead and deliver additional value above and beyond simply being data entry repositories.

Greg Anderson, FrontRange: I would agree [with the pundit's assessment]. People have gotten confused about what CRM means. Many people think of it as the technology that they buy. Technology like GoldMine is only an enabler. A firm must spend the

time to understand their customers and their wants and needs as part of developing a strategy to acquire and retain customers. However, we do believe that CRM is a process. Focus on your biggest pain points, develop your strategy and implement it with the proper tools. A key part of your success depends on knowing beforehand how you measure success. Once you have achieved that success move on to the next step.

Marchai Bruchey, KANA: Having customer data readily available on an agent's desktop is an important part of effectively managing the customer relationship, but CRM must go a step further to ensure that companies are providing a consistent customer experience across all channels so that customers have complete assurance that they'll receive the same level of service regardless of how they choose to communicate. Having the information on hand isn't enough. It is how that information is applied and utilized across these various interaction points that is key in CRM. Going beyond applying information to solve customer problems, but rather proactively anticipating the customer's needs ensures an optimal level of customer service. Being able to provide an answer before the customer even asks a question is what will distinguish a CRM program and build a strong sense of loyalty between the customer and company. It is this focus on the customers' customer that has enabled KANA to be so successful over the years.

Kris Brannock, VSI: We agree 100 percent. Data is useless unless it's funneled, segmented and viewed in the right way, at the right time, and to the right people. In other words, support agents and sales reps need to have the

appropriate data about the customer in front of them so they can follow their process but also make split-second decisions on how to assist the client. Goals regarding customer satisfaction and processes to meet these satisfaction goals need to be in place to maintain a cohesive message to enhance the customer experience.

This technology and methodology hasn't been around forever — what did we do before CRM?

Greg Anderson, FrontRange: CRM came about because people identified a gap. Thinking back, if you are old enough, people kept track of customer information in file folders. If you got a call from that customer you would put them on hold and go to the file folder. If it wasn't in the filing cabinet you had to tell them you would get back to them and then search desk by desk. Not very good customer service. Then slowly, contact management software became available, and over time the features of these programs improved to help manage many other aspects of the relationship.

Marchai Bruchey, KANA: Customers today demand a level of personal attention that requires a sophisticated level of capabilities that didn't exist prior to CRM. These capabilities are closely connected with the evolution of technology and the public's reliance on certain mediums of information gathering and communication. Previously, many call center agents relied on a combination of spiral-bound notebooks, post-it notes and Word documents for ready information needed to resolve customer inquiries. Now, knowledge management software, like KANA IQ, provides a central repository for that critical information. And unlike pure search tools

