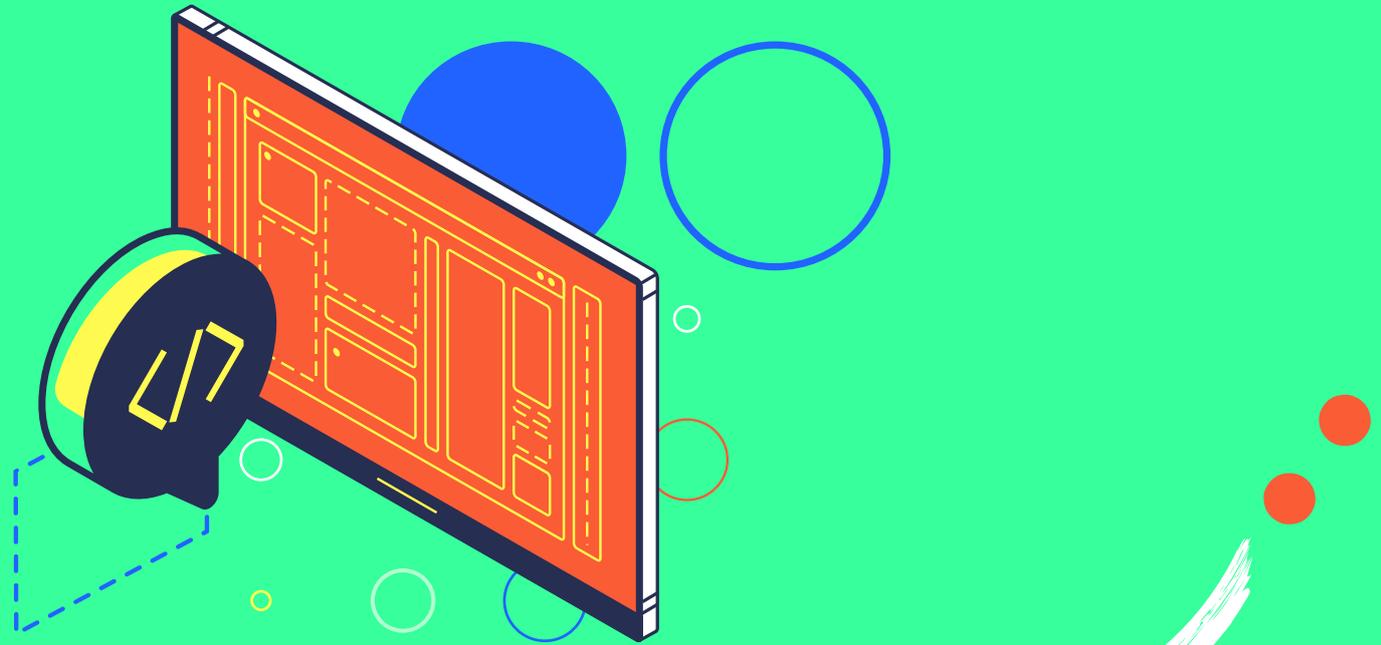


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# Your Guide to Undertaking a CRM Change

**Increasingly, organisations are looking beyond initial sales and thinking about their long term customer relationships. The channels businesses use to communicate with customers have changed over time, with the increased number of touch points, organisations are benefitting from scalable and intuitive customer relationship management (CRM) systems.**



# Why a CRM Change?

## Customer Engagement

Customer engagement is paramount to the continued success of a business. An engaged customer is a loyal customer, and creating loyalty ensures that customers return. These days a CRM can allow you to personalise large scale email campaigns with information such as first names, business names and more. Personal touches like these are the key to engagement because they show the customer that you value them personally.

## Data Insight

Data insight will give powerful knowledge to your organisation for the creation and retention of loyal customers. This includes being able to monitor the success of marketing campaigns via click-through rates and observing the reach of your various channels of engagement. This insight can provide key market trends and predictive analysis allowing you to respond quickly, effectively and in the most appropriate way to changes

## Integrating Systems

Integrating systems is a function available as part of newer CRM's that allows information to be shared between the digital programs that your company uses. This could include web portals, finance systems, event management platforms and more. Integrating systems will ensure that information across these is consistent and there is one 'single truth of information'. It will also cut out the need for manually transferring data, improving company efficiency and freeing up time.

## Internal Processes

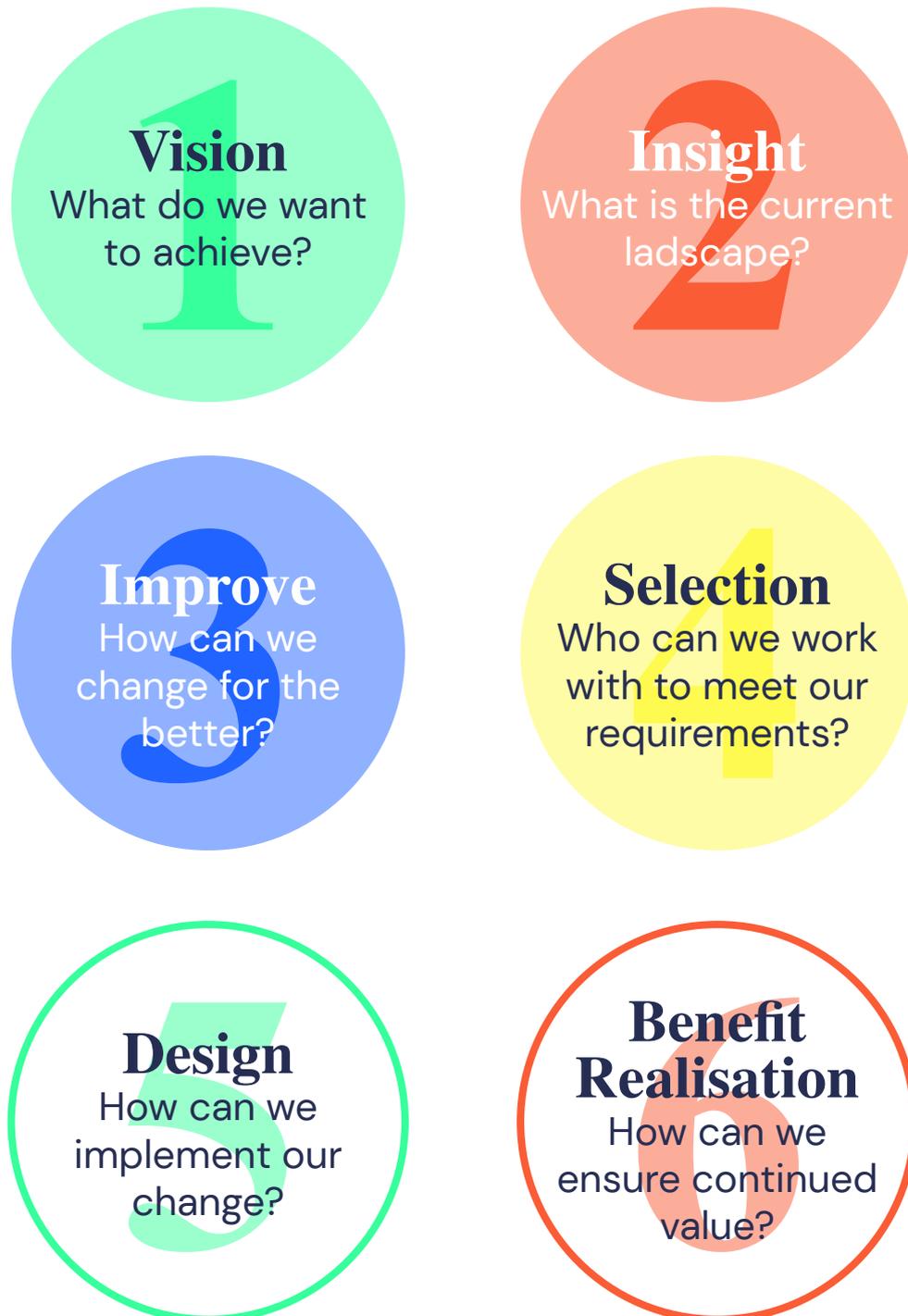
Internal processes can be optimised in a similar way to integrated systems. This is about improving efficiency by trimming the fat from procedures and activities in the organisation. This could manifest as switching from a manual to a digital process, or perhaps creating ease of access for an improved user experience.

**Equantiis' CRM transformation methodology can be broken down into 6 stages. Beginning with the definition of goals, through to identifying room for improvement, selecting a partner to work with – and beyond.**

**Read on for a deep dive into the goals, processes and outcomes of each stage in the CRM change journey.**

# Transformation Structure

Each step in the CRM change process can be summarised with one key question. It's important to have an answer to step 1 before you move to step 2, and so on.





# .. Vision

## Goal

At the vision stage you need to articulate what your organisation is trying to achieve in a way that anyone can understand, relate and reference.

The vision should describe what success looks like for the change, what is going to be different and how this will provide value to the business.

It's important to work as a team to establish a clear definition of your business strategy, and therefore the objectives of your CRM change and how it relates to the overarching strategy. Gather this knowledge not just from your own executives and senior management, but your customers. Working as a team is very important as CRM is largely for their benefit.

## Process

Your first step should be to facilitate a workshop with executives and key decision makers within the business. The aim of the session is collaborating towards a shared goal.

This exercise will play a vital part in ensuring staff have understood the business value and their role in the forthcoming change, it will assist in ensuring potential partners are clear on what is trying to be achieved so they can demonstrate their capabilities in supporting this.

## Outcome

The outcome of the exercise should provide you with a clear and concise message of what success looks like for change. This is the foundation from which you develop your CRM strategy.



# Insight

## Goal

Capturing and understanding the way your organisation currently operates, and the way in which efficiency can be developed, provides critical insight into where the opportunity for improvement is and what needs to be changed in order meet the vision that has been defined. This is known as defining the “As-Is” of the existing environment.

It is imperative that upfront time is invested in this part of the process before considering technology providers, to avoid the project being led by technology requirements rather than technology enabling customer engagement and operational excellence.

## Process

Begin by documenting the customer experience using tools like Customer Experience mapping to visualise how a customer navigates your business. This will highlight the areas that need improvement for those interacting with your business.

Simultaneously, document your existing process and technologies within the company in order to get a deeper understanding of how they can be improved, where there are inefficiencies that could be improved by automation or just process improvement.

You should also consider how your organisation is structured, would change result in the delivery of a better service, or could you improve cross departmental working. Finally, think about your employees and where they may need to be trained.

## Outcome

Once completed, the Insight stage will provide you with full visibility of your people, processes and technology. From this you can qualify how your new CRM project will enable making improvements that ultimately will allow you to realise your defined vision and support the overall business case.



# Improvement

## Goal

You have Customer Experience maps, processes maps and all manner of data. Now you decide how it can be improved. Improvement is about utilising your “As-Is” Insight data to define your new “To-Be” way of working for the new systems and the experiences you want your customers to have, across all aspects of your business.

## Process

Keeping in mind experience, people, process and technology, develop your Customer Experience maps into an ideal “future customer journey”, qualifying the desired experience for your customers. Create “To-Be” processes that describe what is required for you to operate your business and plan adoption of any extra technology that may be required. Create a strategy for the training needs that you previously identified and evaluate of different team structures will help in delivering your new experiences.

## Outcome

Defining the “To-be” environment will give CRM suppliers a good understanding of how you wish to operate. Once you have completed Improvement you can comfortably go to market and procure a system that will be able to match the requirements that you have defined. It will give suppliers context on how you want to operate as a business.



# Selection

## Goal

Now you have your vision, “As-Is” and “To-Be” defined; it is time to go to market.

You are now able to present to a group of partners your vision, challenges and desired changes – to assess how they can enable or support you in achieving your Vision and delivering the changes that are required.

It’s time to select a preferred partner to work with you through your journey.

## Process

It is important to approach a variety of partners and to avoid narrowing your engagement too early. Recognise that there are strengths and benefits to different partners with different types of technology and experience. Prepare a briefing document that describes your change journey, vision and the outcomes that you are trying to achieve. Be transparent about your budget and internal ability to deliver or manage a CRM project. Invite partners to respond and bid for the work by completing a response document that scores responses against your “To-Be” journeys and processes.

## Outcome

It’s important to identify and select a partner to support you throughout your change journey and become an extension of your organisation.



# Design

## Goal

In this stage you need to discover how you will deliver the desired final CRM platform and work with your partner to document how you utilise your chosen solution to deliver the outcomes that you defined during “Improvement”.

## Process

Working directly with your partner to develop a clear and robust processes based from your “To-Be”. Develop your improved Customer Experience and Business Processes following the insight that you gained at the improvement stage. Lastly, conducting training and implementing organisational changes.

## Outcome

Working collaboratively to develop and implement your new ways of working. By the end of this phase you should have trained staff, implemented technology and changed the way that your business delivers the customer experience.



# .. Benefits Realisation

## Goal

Often missed but without a doubt the most important part of this exercise is recognising the value that has been delivered to ensure the overall programme met the outlined business vision. A CRM project does not stop at “Go-Live”, it must be a continual improvement to ensure you realise the maximum benefit from your investment.

## Process

As part of your project you need to have developed a suitable communication plan. This should not just be an internal email, it needs to be engaging to capture the hearts and minds of the users.

Create a working group for people to feed into, for those that want to be part of a positive change. You should also set aside a budget for improvement. Once you have removed the culture of “We’ve always done it that way”, allow staff to change processes in a controlled manner that delivers efficiency and excellent Customer Engagement.

## Outcome

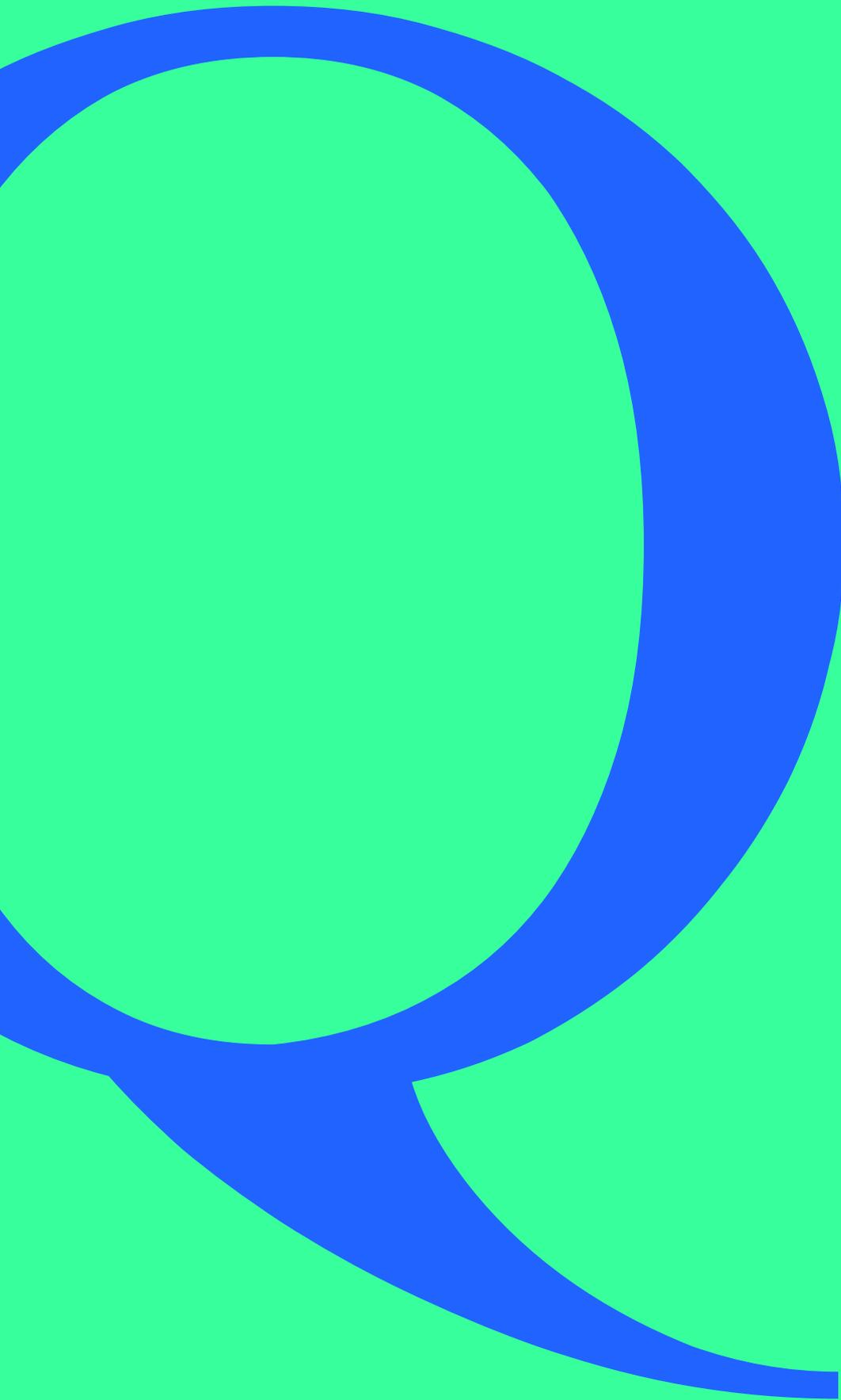
CRM is not a small investment. By continuing to improve, engage staff and monitor your Customers’ Experience, the change will be easily adopted and allow for your investment to be fully realised, which of course will deliver against the original Business Case outlined within your vision.



## .. How can Equantiis help?

Equantiis has a proven track record in guiding organisations through CRM journeys using the methodology in this guide. Engaging with Equantiis will bring a fresh perspective to support your company through this transformation.

Equantiis breaks the traditional methods of consulting by partnering with our clients to understand their business objectives, then bringing real life experience and expertise to support delivering them through a completely independent and agnostic approach. improvement to ensure you realise the maximum benefit from your investment.



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