



## Getting CRM Right

November 2009

- » Welcome and Introductions
  - » Who are Concentrix & why organisations embrace CRM
- » Getting CRM Right
- » Break
- » Hosted CRM – “Microsoft CRM in the Cloud”
- » Business Management with Microsoft Dynamics NAV
- » Questions and Answers
- » Lunch

Concentrix is an IT Services company that specialises in:

- » Customer Relationship Management (CRM)
- » Enterprise Resource Planning (ERP)

Reputable Company, with a Proven Track Record

- » Established in 1999
- » T/O £4.0m & 50+ Employees
- » UK footprint – Head Office Loughborough, London, Bristol
- » 800+ customers



Royal Philharmonic Orchestra

CACI



KONICA MINOLTA



DAIMLERCHRYSLER

- » Understanding Your Requirements
- » Selecting the “Best Fit” Platform – *product agnostic*
- » Defined & Successful Project Methodology
- » Ensuring Return On Investment

- » Who are your customers?
- » How do you classify them?
- » How do you add value to your customers? – USP
- » How good is customer acquisition?
- » Are cross-sell opportunities missed?
- » How are marketing campaigns executed?
- » Customer satisfaction high or low?
- » Is there a defined Sales Methodology?

- » Staff spend 3 to 4 hours a week looking for information?
- » No central database on customers & prospects?
- » Information is kept on paper, spreadsheets, individual's memory, laptops, filing cabinets, other systems etc.?
- » Customer service levels not what they should be?
- » Target marketing is labour intensive?
- » Lack of visibility and integration to other business applications?



## Islands of Information

*“Enterprises that deploy CRM strategies will return at least 25% better financial metrics than those that don’t.”*

Source: Scott Nelson – Gartner Group





## Getting CRM Right

**John Odell**

November 2009

- » CRM *is* a Business Strategy and Culture
- » CRM *is not* about software or a "system"
- » The software is merely a tool
- » "**Customer**" Centric approach to business not Product or Service Centric

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- » "**Stakeholder**" Centric

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- » "**Member**" Centric

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- » "**Supplier**" Centric

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- » "**Whoever**" Centric – "**xRM**"





- » Sales
  - » Track, Manage, Forecast, Analyse
- » Marketing
  - » Segment, Optimise, Personalise, Report
- » Service
  - » Improve Service Level, Automate, Escalate
- » Anything / Everything
  - » What do you do?

- » Understand what CRM is and isn't
- » Identify problem areas / "pain"
- » Set measurable objectives and KPI's
- » Choose the right Business Partner

- » Deployment Options
  - » Hosted vs. On-premise
  - » Off-line data
  - » Real-time data
- » Functionality
  - » “Killer” Requirements
  - » Details
  - » Leverage Existing Solutions
- » Budget
  - » Infrastructure
  - » Licenses (and discounts)
  - » Professional Services

- » Invest in Solution Design
- » Constant involvement & Regular review
- » Measure against business objectives / KPIs
- » Has it killed / numbed the pain?
- » Analyse Return On Investment

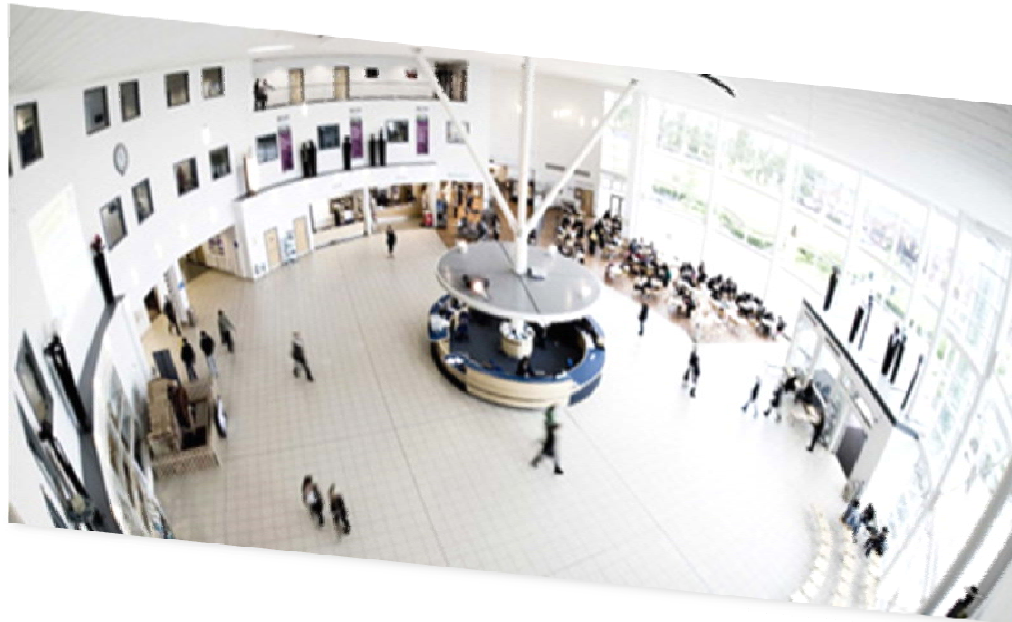
# XC Trains

## Customer Service Management



# Darlington College

## Employer Engagement



# British Gymnastics

## Membership Management





# Mac Motorcycles

## Marketing & Research



# The Tile Warehouse

Retail Marketing & Customer Service



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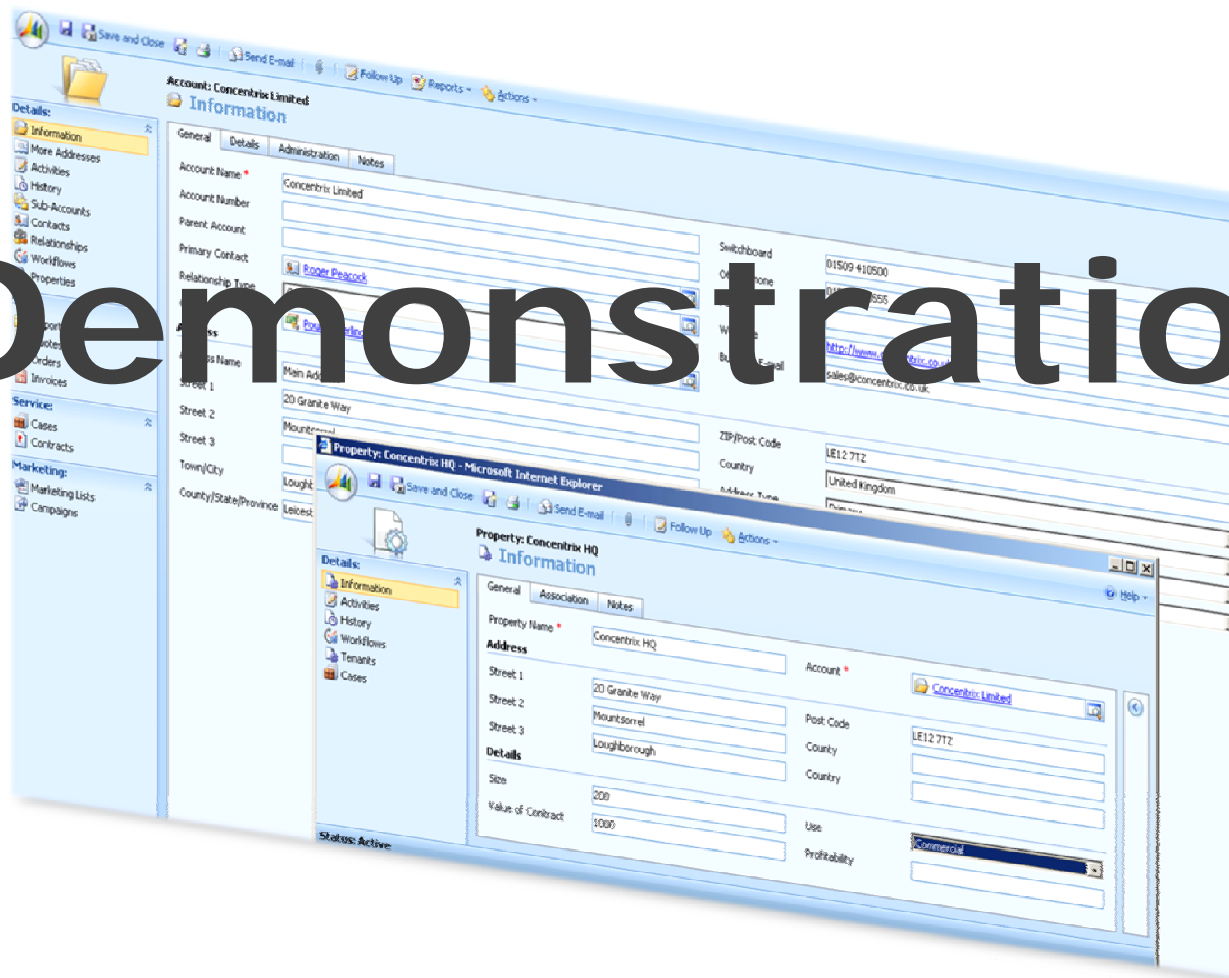




Source: Huffingtonpost.com

- » Help business leverage Social Networking
- » Gather and track conversations
- » Join in conversations (reactive)
- » Research and profile customers & leads
- » Engage / start conversations (proactive)

# Demonstration





# Questions?



## John Odell

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