



The

Marketing Director's Guide to Selecting CRM

A Collier Pickard Publication

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Forging the Future

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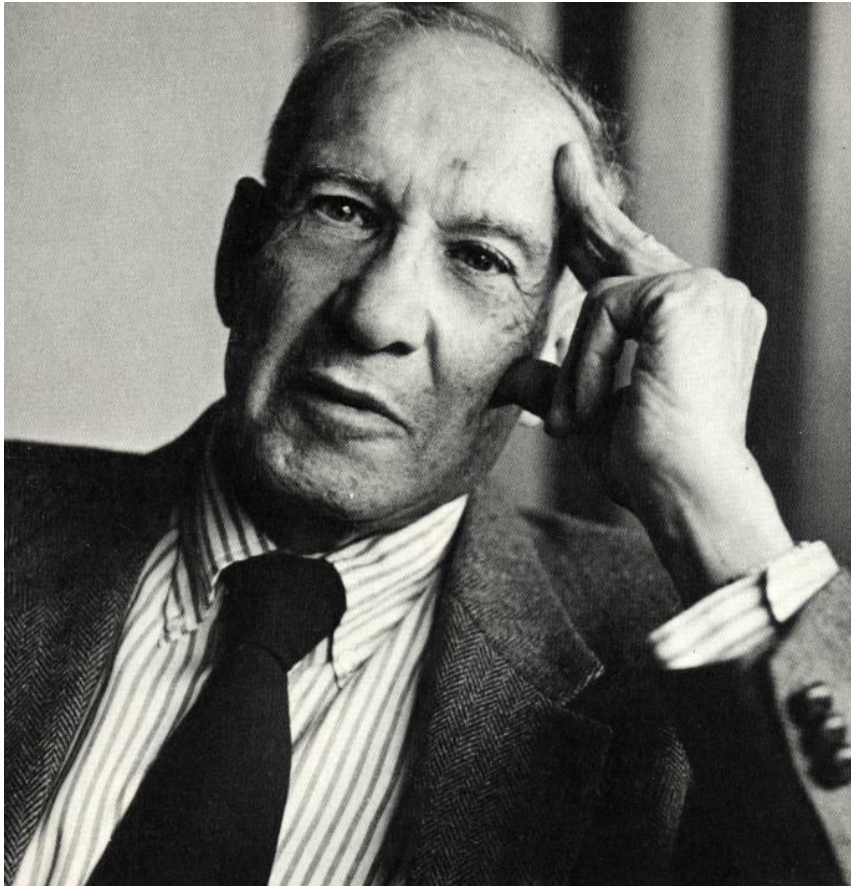


As **Marketing Director** the responsibility for deciding the future direction of your organisation lies with you. The combination of your vision and your understanding of your ideal customer enables plans to be developed and put into action.

Peter Drucker once wrote “**marketing is everything you do, as seen from the customer’s perspective.**” Traditionally this has been the case, with marketing directors concerning themselves with ensuring that everyone across the organisation delivers a consistent message to customers and prospects. But times change, and as the range of channels through which you communicate with your target audience expands, this control can easily weaken.

What’s more, if you allow your attention to become too focused on controlling the message at scale and speed across these diverse platforms are you still able to produce the grand vision and strategic planning that are so integral to your role.

This guide will argue that CRM has an essential role to play in supporting your marketing efforts and developing your business. We will show how changes in the way companies **acquire, develop** and **retain** profitable customers reinforce the need for marketing to drive the adoption of CRM systems.



Many of the quotations in this guide are from **Peter Drucker**. Once described as the “**grandfather of modern marketing**”. He is accredited with creating the phrase “**knowledge worker**” way back in 1959.

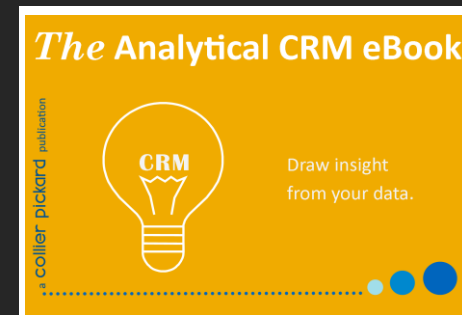
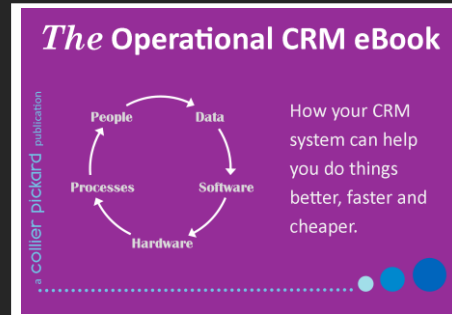
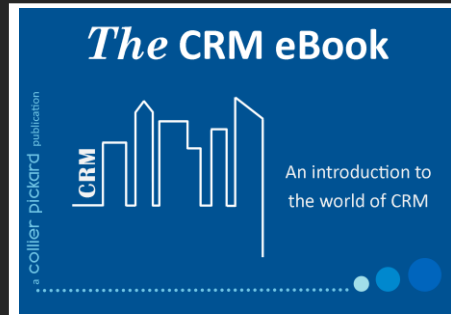
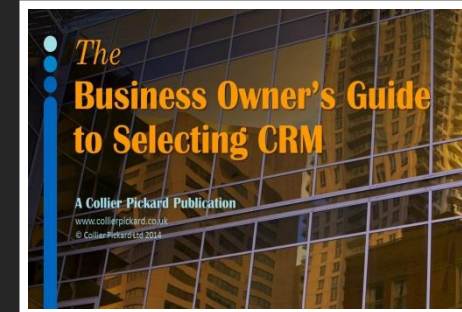
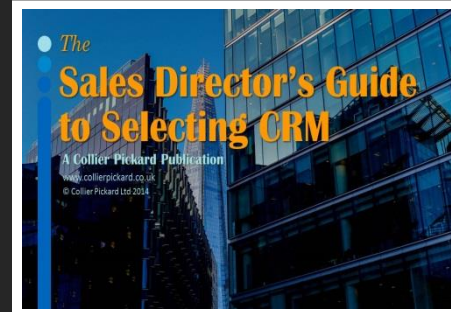
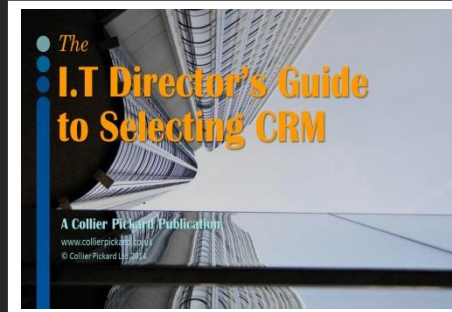
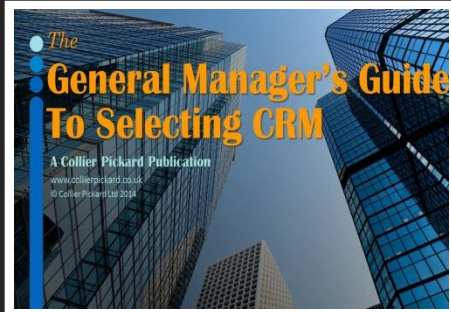
Why so many quotes from Peter? Perhaps because his vision still serves as a guide to the best in CRM:-

“The purpose of a business is to create and keep a customer”

This eBook has been written to help you do exactly that, with the aid of a well-chosen CRM system.

If you'd like some help with the process of implementing CRM in your organisation, you can click the Collier Pickard icon on any page to arrange a free consultation with our team.

(If you, or your colleagues are still looking for other simple concise guides to CRM then you may find some of our [other](#) publications useful).



If you'd like some handy guides to help you communicate the message about CRM and guide your team we have a range of eBooks that can help – starting with *The CRM eBook* – What Works... What Doesn't.

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"The best way to predict the future is to create it."

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As a **Marketing Director**, or Chief Marketing Officer, you are responsible for defining corporate strategy, identifying the tactics that support the strategy and address key target markets. You may even be responsible for coaching or mentoring people in the execution of their job roles.

Increasingly you are a story teller. Your input is essential to product development, and ultimately how your brand is perceived.

With such a pivotal role in the company it is unsurprising that according to Gartner:

"By 2017 the CMO will Spend More on IT Than the CIO"

Perhaps what is surprising is that many businesses and consultants approach their needs from a technology perspective.

Identifying software tools should be the last step in your CRM journey.

We recommend using our [STEP CRM](#) project methodology when looking to select CRM.

[STEP](#) focusses on your Strategy, Tactics, Execution, and Platform – in that order!

“Business has only two functions...

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... marketing and innovation. All the rest are costs.”

In order to achieve **continued growth** your organisation must truly understand its customers, its products or services and its approach to the market. The knowledge you need to form these understandings can be found inside your **customer relationship management system**.

Who will you sell to? Do you have a solid understanding of your buyers? Or of your prospects and leads? Understanding who you successfully and (perhaps just as importantly) unsuccessfully sell to allows greater targeting of your marketing efforts. A well implemented and maintained CRM system would contain all the data you need.

What will you sell? What are your customers and prospects looking to buy? What have they bought in the past? What deals were closed, and which fell through?

Understanding your **products** and **services** in detail increases your understanding of what route to market to take. Again, this information can all be found in a well maintained CRM system.

A Brief CRM History

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Based on this information you have gathered, ideal customer profiles and “**Buyer Personas**” can be developed.

Historically, these were originally stored in proprietary databases. Back in the 1980’s, improvements in technology and the emergence of Personal Computers made it possible for marketing to build repositories of information on prospects as well as customers. No longer did you need an IT department to design and build databases.

Over time the authors of these databases identified that there were significant similarities in the requirements they gathered from marketing departments.

This understanding of similarities lead to the creation of database products pre-configured to meet such common requirements. These systems became known as **Contact Managers**, and started the CRM sector.



The right fit for your business

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CRM systems need to provide adequate ways to **store, index** and **retrieve information**. They must be able to identify target segments that meet specific characteristics. In addition they should provide tools that act on the data and achieve something. From blasting of email, to deep analytical tools CRM is about using data to achieve a business goal.

Back with Peter Drucker:

"The aim of marketing is to know and understand the customer so well the product or service fits him and sells itself."

In the past CRM could aggregate and manage data from internal sources to build a picture of the customer. Now the requirement is to **consolidate data from multiple disparate sources to inform your every action**.

That is not to say that the CRM system has to manage every source – but it does need to be able to link to customer data, wherever it is. Specialist tools that manage social media, web analytics, and digital communications are highly specialised. The best CRM platforms are agnostic and allow you to **choose the one that works best for your business**.

“Selling focuses on the needs of the seller, marketing on the needs of the buyer”

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Not a quote from Peter Drucker this time, but one from Harvard in the 1960s. We find this approach useful when working with **marketing directors** in the selection of CRM systems.

Following a [STEP review](#) that identifies **strategy, tactics, execution** and **platform requirements** it is important to develop a **CRM implementation plan**. This sequencing of events, priorities and deliverables is essential to ensuring your CRM project achieves a return on investment.

Identifying implementation priorities and deliverables can be challenging. We have developed a systematic approach based on the idea of CRM maturity.

The first priority is the development of consistent, relevant, accurate and accessible information. This involves developing your **ideal customer profile** into a data structure. In order for this to happen, the CRM platform you select must allow for the easy and consistent recording of data.

Data relevance was the essential learning point from the earliest days of CRM. Designing a CRM platform to store, and process data that is relevant to your target markets and customers, is essential. It is why our [STEP process](#) focusses on **Strategy, Tactics** and **Execution** to define the needs of your CRM Platform.

For data to be consistent – it **must be used by everyone**. If handling your customer data requires additional specialist software (sales order processing, invoicing etc.) then ensure that the results of that processing are available within the CRM system.

Data accuracy can be measured and tracked through regular audits and careful management. Setting yourself the goal of “**perfect data**” is often prohibitively expensive and inadvisable. As a part of any CRM project it is essential that you identify your data quality standards.

Making your CRM system **accessible** is an absolute necessity. Gone are the days when CRM applications were not available anywhere, anytime and from any device.

Integration

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CRM platforms have in the past focused on the integration of internal data. Most CRM platforms deliver functionality for Sales (Opportunity Management) and Post Sales (Customer Service). Increasingly, CRM systems offer integration links to **marketing automation platforms**, **social media tools** and other **website integrations**.

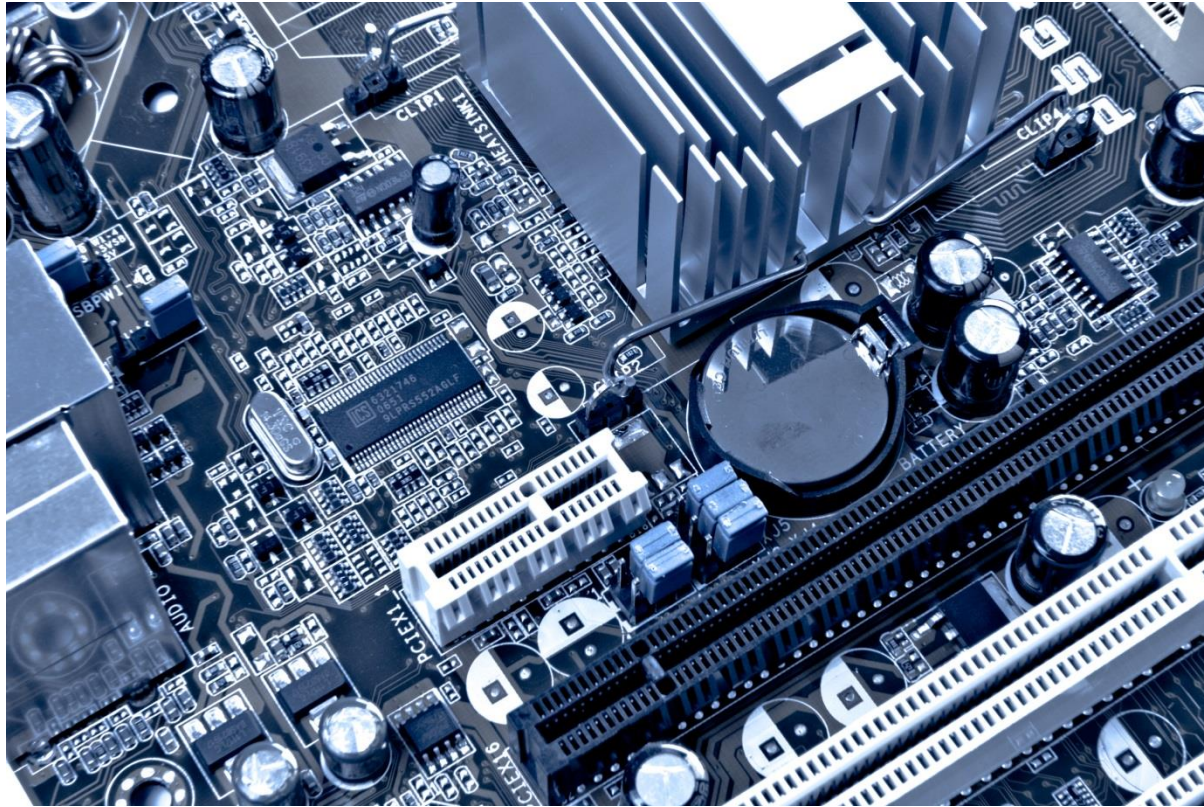
Whilst in some businesses these are essential tools, changes in buyer behaviour means they are not essential for every organisation.

The aim of this integration is to provide a **single consistent version of the truth**. It is the primary method of delivering the data on how well you are doing. For example, campaign conversion and return on investment information becomes a by-product of CRM usage.



CRM vs Business Intelligence

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CRM built on consistent data and integrated with other key systems to provide a single version of the truth, already provides tangible benefits. Reductions in costs to communicate and improvements in targeting and market understanding will directly impact the bottom line.

However these benefits would also be available if you were to consider a **Business Intelligence** (BI) project for your business. BI projects are big news at the moment. IT departments like BI projects. **They allow IT to control access to information.**

They are promoted as a way of developing business insight. They could provide that ROI information on your last campaign. They could bring together the costs and returns to help you work out which marketing is working – and which is not.

CRM vs Business Intelligence

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CRM does more. CRM links that **insight to processes.** Processes are the things that people do to convert insight into action. If the BI project delivers a list of people who clicked on a link in your last email, CRM allows you to schedule meetings with those people and start the series of steps that are your sales process.

What BI projects have are powerful tools to help you visualise and understand data. This is why **many CRM platforms have their own BI tools.** Increasingly users do not want to view plain text on a screen.

Why not let them see heat maps of customer spend? Why not drive highly targeted actions based on clicking bars on a bar chart, or slices of a pie? Not only does this reduce the cost of training it increases user engagement.



CRM vs Business Intelligence

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At the heart of all the best CRM initiatives is the move to put the **customer at the centre of everything you do** - building a comprehensive and accurate understanding, which guides the actions of everyone across your organisation to delight the customer.

Entire libraries of business books describe the benefits of customer centricity, and the potential to improve margins through customer retention strategies, and upselling and cross selling.

Within your CRM project we have identified 3 of the 4 levels of CRM maturity. We have provided a single version of the truth. This is fed by relevant data from multiple sources. It provides information and assists in the execution of day to day tasks.

When you have reached this level it may be tempting to stop. Which would be a shame.





Level 4 CRM maturity on our scale is about **transforming your business**. It is about using technology, not just to do things better. Level 4 is about doing better things.

CRM technology, allows you to change the way you acquire retain and develop profitable customer relationships. The same data that informs your decision making process can be used to drive automated process.

CRM vs Business Intelligence

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Many CRM vendors will tell you that this vision of the future is easy (it isn't) or impossibly hard (it isn't). They will tell you it is expensive (it needn't be) or it is cheap (it isn't). Some CRM vendors will tell you anything to persuade you to buy some software.

Our approach is different. Using our [CRM STEP analysis tools](#) and [CRM maturity assessment](#) we will guide you in the identifying the functionality you need. We can help with marketing CRM within your organisation.



The Marketing Directors CRM Questions:

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If you are researching CRM solutions then the **following questions** will help in your selection process:

- Do I have a clear CRM strategy?
- Do we have the right I.T hardware?
- Can I (and will I) use the proposed system?
- Can a CRM partner help me develop my strategy?
- Does that partner have experience in my industry?
- What percentage of the total CRM cost is software?
- What KPIs will confirm that CRM is working as expected?
- Who can run the system? Are internal IT people required?
- Is there a clear process for understanding my business needs?
- Can the system be access anywhere at any time on any device?
- Does the solution help me read my customers digital body language?
- Can the CRM system be implemented quickly and changed as needed?
- Does that partner have consultants with a track record of success in sales?

Where now?

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CRM is a journey. We hope that you select us to be your guide. We are passionate about CRM and what it can do for businesses, and their customers. You can see our passion in our thought leadership, blogs, and events.



eBooks



Videos

If you'd like to talk to one of our consultants about your CRM project you can arrange a free, online consultation here:



Consultation

Or if you'd like to sit back and let the information come to you for a while before you make any big decisions, you can connect with us on these social networks...



Or subscribe to our blog. That way you'll receive a steady stream of CRM information that you can dip into as your time and interest allows!



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