

Collier Pickard Workshop: Managing through CRM

A 1½-day workshop with Collier Pickard

What is the objective?

The long term success of CRM projects is directly proportional to the commitment of the Management Team to the CRM platform. This workshop develops practical tools to assist the management team in understanding the wealth of data generated by the system; its focus is operational “best practice”.

Based on this understanding the workshop will assist managers in embedding the CRM platform and relevant tools into their management approach.

From insight, through mentoring to control, the tools and techniques developed during this workshop will provide invaluable assistance in the management of customer focused teams. By providing a consistent approach to the development and monitoring of the CRM user community, organisations can significantly enhance the value of their CRM platform, and realise their top level goals.

Who should attend?

Senior Executives/Directors and departmental heads.

What is the workshop format?

The workshop will follow a structured format:

- Introductions and expectations setting
- Review of the current management style/tools
- Production of KPIs and exception reports from the CRM platform
- Use of the CRM tool in internal meetings
- Mentoring users through the CRM tool
- Performance monitoring
- Development of change plans to realign customer focused activities
- Plans for the ongoing refinement of the use of the CRM system as a management tool.

This is a group session and all the attendees will normally participate. As facilitator(s), the Collier Pickard consultant(s) will chair the brainstorming sessions.

The format of the workshop is intentionally dynamic. Attendees will have the maximum opportunity to influence the group discussion and therefore generate practical tools for use across the organisation.



What is the output from the workshop?

By the very nature of the workshop, outputs are specific to the company and the achievement of its top level goals. Previous clients have created the following:

- Communications plans and content for CRM users
- Management mentoring programmes
- Internal meeting agendas and reporting guides within the CRM platform
- Revised KPIs and exception reporting
- Specifications for automated business alerts and customer centric workflow

Are there any pre-requisites?

Participants are expected to understand the top level goals of the organisation and the manner in which these goals unfold into tactical plans.

A definition of STEP accompanies this document:



What will Collier Pickard contribute to the workshop?

Collier Pickard is a specialist organisation. Our consultants and other professional staff deal exclusively in customer management – operational CRM, analytical CRM and CRM best practice.

Collier Pickard has a track record of successful customer management software implementations, despite the fact that statistics published by the Gartner Group show that over 60% of CRM projects fail to deliver the expected returns after deployment.

Senior consultants managing workshops have a minimum of 20 years experience in corporate sales, sales management and business development, and will have used a CRM platform as a management tool.

This experience and industry knowledge will be applied to the analysis of your business and to the scoping of your best practice in managing through CRM.



About Collier Pickard

Collier Pickard is a specialist CRM consultancy.

We have evolved best practice as CRM has transformed over the past 20 years and now encompasses everything from marketing automation to business intelligence. Our understanding of CRM enables us to address the demands of culture change required to make CRM effective across the whole organisation.

Collier Pickard—

- ✓ Chosen by small firms for local support
- ✓ Chosen by multinationals against major consultancies
- ✓ Chosen for its depth of knowledge of the CRM world

For more information on this workshop and/or other workshops and services of Collier Pickard Ltd, please contact:

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