

# Preparing for CRM

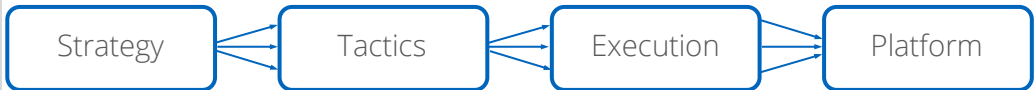
How to get your priorities in order  
before you delve into software

## Why do you need to prepare for CRM?

Some years ago the Harvard Business Review ran a paper called “CRM Done Right”. The paper made a recommendation to organisations considering an investment in CRM; the recommendation stressed the importance of being able to answer four questions. The answers to the questions must give clarity and focus to the CRM initiative.

1. Is it strategic?
2. Where does it hurt?
3. Do we need perfect data?
4. Where do we go from here?

We have used this tenet to drive CRM preparation at a number of clients in recent years:

Is it strategic?	The answer must clearly be “yes” → the management team must fully support the plan; performance measures should be applied whenever possible.
Where does it hurt?	The answer must be derived from the opinion of stakeholders within the organisation → face-to-face interviews, based around structured questions, is a commonly-used technique and should include an assessment of CRM Maturity conducted before, or as part of, the interviews.
Do we need perfect data?	<p>The answer here will determine the nature of components of the Execution level within the STEP process:</p>  <pre> graph LR     Strategy[Strategy] --&gt; Tactics[Tactics]     Tactics --&gt; Execution[Execution]     Execution --&gt; Platform[Platform]             </pre> <p>Collection and management of perfect data is almost always time consuming and expensive → the value of the contribution different elements of data make to the organisation’s top level goal (Strategy) will therefore influence the policy of data management within the CRM culture. Perfect data may not deliver value for money.</p>
Where do we go from here?	The answer is the programme for CRM → how to articulate the answers to the other three questions; present this as a plan for change; assess the “gaps” which must be addressed as part of the change plan; prioritise activity.

So why do you need to prepare for CRM?

Because without proper planning, the initiative will lack focus and you will have difficulty measuring the success of your investment.

## ... And how do you prepare for CRM?

You know how to manage your clients and your prospective customers but the systems you use could be better. Maybe you are new to CRM solutions or perhaps your existing system is not delivering the results you want. Either way, a change to CRM requires careful planning.

You need to understand your tactical plans—how you acquire new clients, develop relationships and retain loyal customers—before you start looking at software packages. If you prepare for CRM in this way, you will be able to identify the features which deliver the highest value and eliminate the "nice to have" items which can cloud the issue.

The scale of your CRM initiative and your familiarity with its nuances will determine which consultancy package will deliver the best value to you and your organisation.

## CRM consultancy packages

Quick start pack	<ul style="list-style-type: none"> <li>✓ Familiarisation with your business</li> <li>✓ Interview with the key stakeholder</li> <li>✓ Review of appropriate CRM solutions</li> <li>✓ Draft recommendations: Your best approach</li> </ul> <p><b>Delivered</b> → a CRM roadmap for your business</p>	Fixed fee: £4,000 + travel
Professional pack	<ul style="list-style-type: none"> <li>✓ Familiarisation with your business</li> <li>✓ Interviews with 6 key stakeholders</li> <li>✓ Review of outcomes &amp; best practice</li> <li>✓ Review of appropriate CRM solutions</li> <li>✓ Detailed report and recommendations</li> </ul> <p><b>Delivered</b> → a programme of priorities and actions for CRM for your business</p>	Fixed fee: £9,000 + travel
Enterprise service	<ul style="list-style-type: none"> <li>✓ Familiarisation with your business</li> <li>✓ Detailed planning (engagement model)</li> <li>✓ Interviews with all/selected stakeholders</li> <li>✓ Bespoke measurements of CRM Maturity</li> <li>✓ Graphical analysis using QlikView modelling</li> <li>✓ Review of outcomes and all possible options</li> <li>✓ Review of CRM market &amp; appropriate solutions</li> <li>✓ Structured report, time plan &amp; recommendations</li> <li>✓ Preparation of RFP/ITT documentation (optional)</li> </ul> <p><b>Delivered</b> → a programme of priorities and actions for CRM for your business; metrics from gap analyses; a model for user engagement and culture change</p>	Fee by arrangement

## Why choose Collier Pickard?

*Collier Pickard is a business partner and reseller of specific CRM systems—so the recommendation will always be for one of our own solutions, right?*

No—not right! We have recommended solutions which we do not supply when this is the right thing for the business and its culture.

Preparing for CRM consultancy assignments are undertaken in a strictly unbiased manner. Any conflicts of interest during the course of the assignment are declared at the earliest opportunity.

You get the benefit of 20 years' experience in this specialist area of customer focus, team culture and business automation—a deep understanding of what works/what doesn't and real-world guidance derived from working with most of the major CRM packages in hundreds of organisations.

## 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

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