

Collier Pickard Workshop: STEP Top level goal definition for CRM

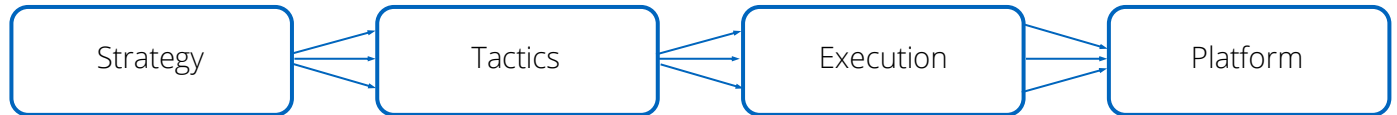
A 1½-day workshop with Collier Pickard
(a.m. & p.m. on day 1; wrap up a.m. day 2)
... for Directors and Senior Managers

What is the objective?

"CRM cannot be installed but, rather, it must be adopted."

Martha Rogers, Peppers & Rogers Group.

A definition of STEP accompanies this document:



STEP is Collier Pickard's proven methodology for the deployment of simply successful CRM. STEP is built on our deep understanding of what works and what doesn't in CRM initiatives.

The objectives of this workshop are:

- To understand the scope and direction of the business top level goals and objectives;
- To identify the major KPIs which measure success; and
- To identify the timescales associated with goals.

The workshop is an opportunity to:

- Define the boundaries of CRM, and
- Establish what constitutes a CRM investment

... in line with the "customer-journey approach" to CRM advocated by Ang and Buttle, Buttle Associates.

Who should attend?

Senior Executives/Directors and departmental heads.

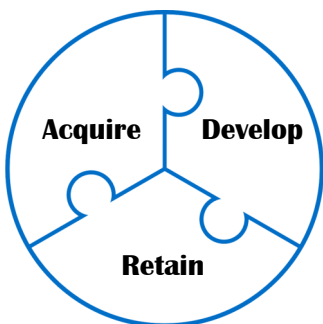
What is the workshop format?

The workshop will follow a structured format:

- Introductions and expectations setting
- Review of corporate strategy
- Review of tactics in play to deliver against the strategy
- A definition of the "customer-journey" from never-a-customer to always-a-customer
- Conclusions and next steps

This is a group session and all the attendees will normally participate. As facilitators, the Collier Pickard consultants will chair the brainstorming sessions.

The format of the workshop is intentionally dynamic. Attendees will have the maximum opportunity to influence the group discussion.



What is the output from the workshop?

By the very nature of the workshop, outputs are specific to each company. Outputs may include, but not be limited to, the following:

- Definition of the growth plans of the company
- Definition of the personnel/capabilities needed to support the growth plans
- Definition of the cultural infrastructure required
- Definition of the technology infrastructure needed
- Identification of barriers to success
- Identification of the KPIs needed to measure success
- Development of executive buy-in to a CRM initiative
- Identification of the top level CRM sponsor
- Creation of a high level plan to kick off a CRM initiative

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.

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 and marketing, sales management and business development, and will have been instrumental in the development of a CRM culture.

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