

A young woman with short brown hair is smiling broadly, wearing a white turtleneck and a headset with a microphone. She is holding the microphone with her right hand. The background is plain white.

CRM Operations

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1 Introduction – Service Operations

Operations are the connections between your organization's strategy and its lasting success. Now, more than ever, startups, and companies that implement scalable frameworks, and operating models are gaining a competitive advantage. These operational practices enable people, transform processes and deliver inclusive growth & value.

Key Service Operations:

- Support Operations (ASM & Service Desk)
- CRM Operations

2 CRM Operations

2.1 Goal

- Up to 80% reduction in bad and doubtful debt.
- Up to 6% increase in operating profit (EBIT).
- 8-10% increase in net profit (PAT).
- 70-90% renewal rate (1st year).
- 2X increase in customer satisfaction.
- 35-75% increase in productivity.

2.2 Approach

- Understand the needs: Discussion with business leaders to understand the purpose of CRM, and business needs.
- Analyse existing CRM systems and processes.
- Spot areas of improvement.
- Identify the goals to be achieved by aligning to corporate goals.
- Choose the right type of CRM software to be implemented which will fulfill the business needs. Preparation of Statement of Work (agreed in-scope and out-of-scope tasks).
- We are all set to go.

2.3 Value Zones – CRM Operations

- Improved internal and customer experience.
- Customer Satisfaction Index.
- Net satisfaction score.
- Net promoter score.
- Renewal rate.
- Increased yield.
- Retention rate.

2.4 Framework benefits

- Right-fit CRM model, roles to scale.
- Cost control and efficient operations.
- Seamless customer experience.
- Improved value proposition.
- Brings service-oriented culture to the organization.
- Improves the financial health of the business.
- Improves the product through the customer feedback loop.

2.5 Key Initial Activities:

- Software identification and evaluation.
- Define team structure for CRM.
- CRM processes to design and development.
- Define roles and responsibilities.
- Define KPIs for each Role.
- Process rollout & user adoption plan.
- CRM process training for each function. (sales, CRM, marketing)
- Complete process documentation.

2.6 Post Implementation Activities:

- Prioritise the functional requirements to fulfill business requirements.
- Observation of process workflow and fine-tuning for each function.
- Identify gaps and take course correction actions.
- Identify, design, develop, and implement new workflows when needed.
- Ensure process adherence by system and people.
- Continuous motivational and morale-boosting interactions with employees.
- Analysis of customer interaction data and strategize accordingly.



2.7 Management Reporting:

- Scheduled/ad-hoc reports.
- Generic reports.
- Standard analytical reports.

2.8 Documentation and collateral

- All process documents
 - Pre-sales processes
 - Data mining and leads generation.
 - Demo and trial account.
 - Client on-boarding.
 - Post-sales processes
 - Customer training.
 - Relationship building.
 - Renewal.
 - Collections.

2.9 Training

- CRM framework training.
- Product training for Sales and CRM staff.
- CRM communication training to CRM staff.

2.10 Successful Handover & Closure

- Mentoring from day one.
- Effective extraction and completeness of knowledge transfer.
- Completeness of documentation.
- Complete transparency on transition activities.