INTRODUCTION
CUSTOMER RELATIONSHIP MANAGEMENT &
CUSTOMER JOURNEY MANAGEMENT

Christoph Edinger | Principal Consultant

Moritz Neth | Consultant

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INTRODUCTION
CUSTOMER RELATIONSHIP MANAGEMENT & CUSTOMER JOURNEY MANAGEMENT

CHECK-IN

Brief introduction

- Who am I?
- How long have I worked at DIGITALL?
- Expectations of the training

Objective

I. Basic understanding of holistic CRM
II. Connection with the customer journey and
III. Reference to the DIGITALL portfolio

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INTRODUCTION – CUSTOMER ORIENTATION

- What do you understand by CRM?

- What was your best experience with customer orientation?

- What was your worst experience with customer orientation?

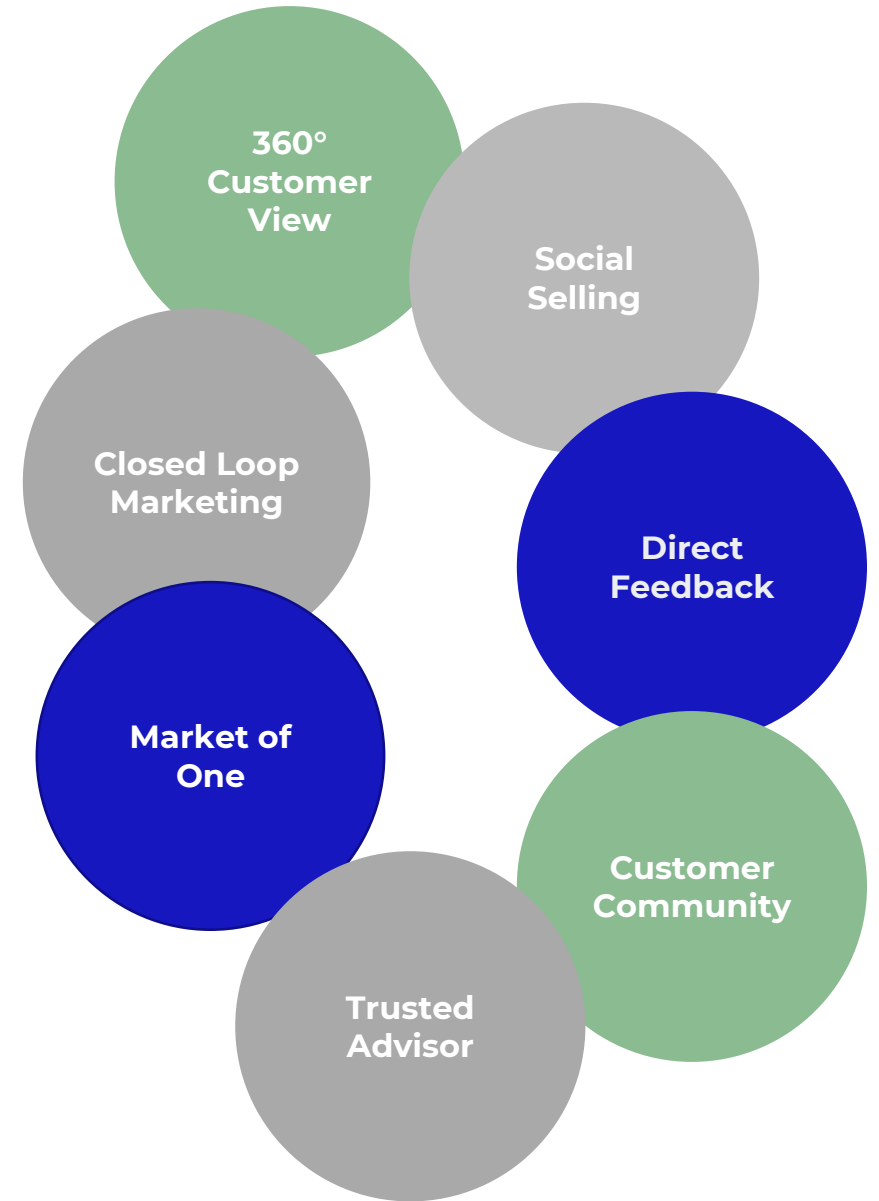 - Why did the company fail to meet your expectations?

AGENDA

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Chapter 1

CRM – CUSTOMER RELATIONSHIP MANAGEMENT

- Definition of CRM
- Benefits of CRM
- CRM architecture
- CRM in practice

WHAT IS CRM? THE AUNT EMMA SHOP?

- 360° Customer View
- Social Selling
- Closed Loop Marketing
- Direct Feedback
- Market of One
- Customer Community
- Trusted Advisor

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BASICS OF THE CRM

THE MEANING OF CRM IS DERIVED DIRECTLY FROM THE INDIVIDUAL TERMS.

Customer

The customer is in the center of the companies' activities. CRM therefore enables the company to consistently focus on the needs and wishes of customers in order to optimize customer contact and customer loyalty.

Relationship

Different areas of the company can have a relationship with a customer, e.g. sales, marketing, service. CRM helps to document these relationships and stabilize them in the long term.

Management

Information about customers and their relationships with the company is documented in order to keep this knowledge centrally in the company. CRM thus provides the company's employees with a 360° view of the customer, encompassing all touch points with the customer (relationships, contacts, purchases, etc.).

GOAL AND BENEFIT OF AN INTENSIVE CUSTOMER RELATIONSHIP 1/2

Increased planning reliability

- Long-term customer relationships increase the company's planning reliability. This is primarily due to the increased barriers to leaving and switching during a business relationship.

Increased inclination to provide information and complaints

- Due to the increased exchange of information, there is an increased ability to make statements regarding future opportunities and risks during the business relationship.

Increased sales volume

- During the duration of a customer relationship, the cross-selling and up-selling potential increases, which significantly increases the sales volume per customer over time.

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GOAL AND BENEFIT OF AN INTENSIVE CUSTOMER RELATIONSHIP 2/2

Improved scope for pricing policy

- The development of a long-term customer relationship creates pricing policy leeway and thus the possibility of directly increasing sales by absorbing consumer surplus.

Positive referral behavior

- Satisfied customers recruit other customers. This rule of thumb of a successful customer relationship influences the sales achieved through positive referral behavior.

Cost reduction potential

- Increased customer satisfaction leads to cost reduction potential due to increased employee satisfaction and lower fluctuation. In the long term, there is also considerable potential for reducing costs, in particular by reducing the intensity of customer care in the sense of lower administrative, sales and monitoring expenses.

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APPROACH IN CRM

Increase Profitability

Customer acquisition: Increase customer base

Customer retention: Retain profitable customers

Customer selection: Identify profitable customers

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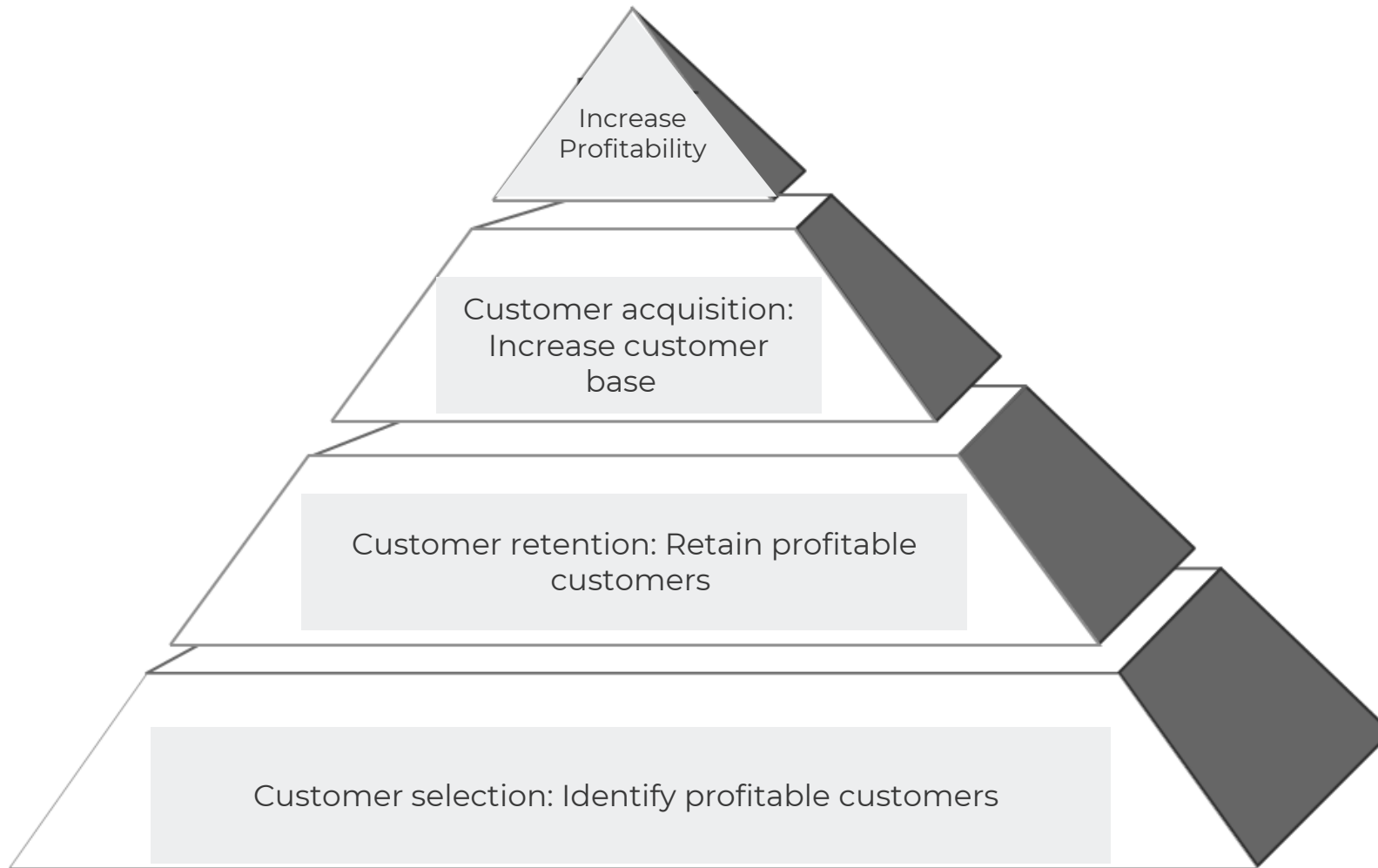
CRM IN PRACTICE
FUNCTIONAL SCOPE OF STANDARD SOFTWARE

Microsoft

ORACLE®

salesforce

veeva

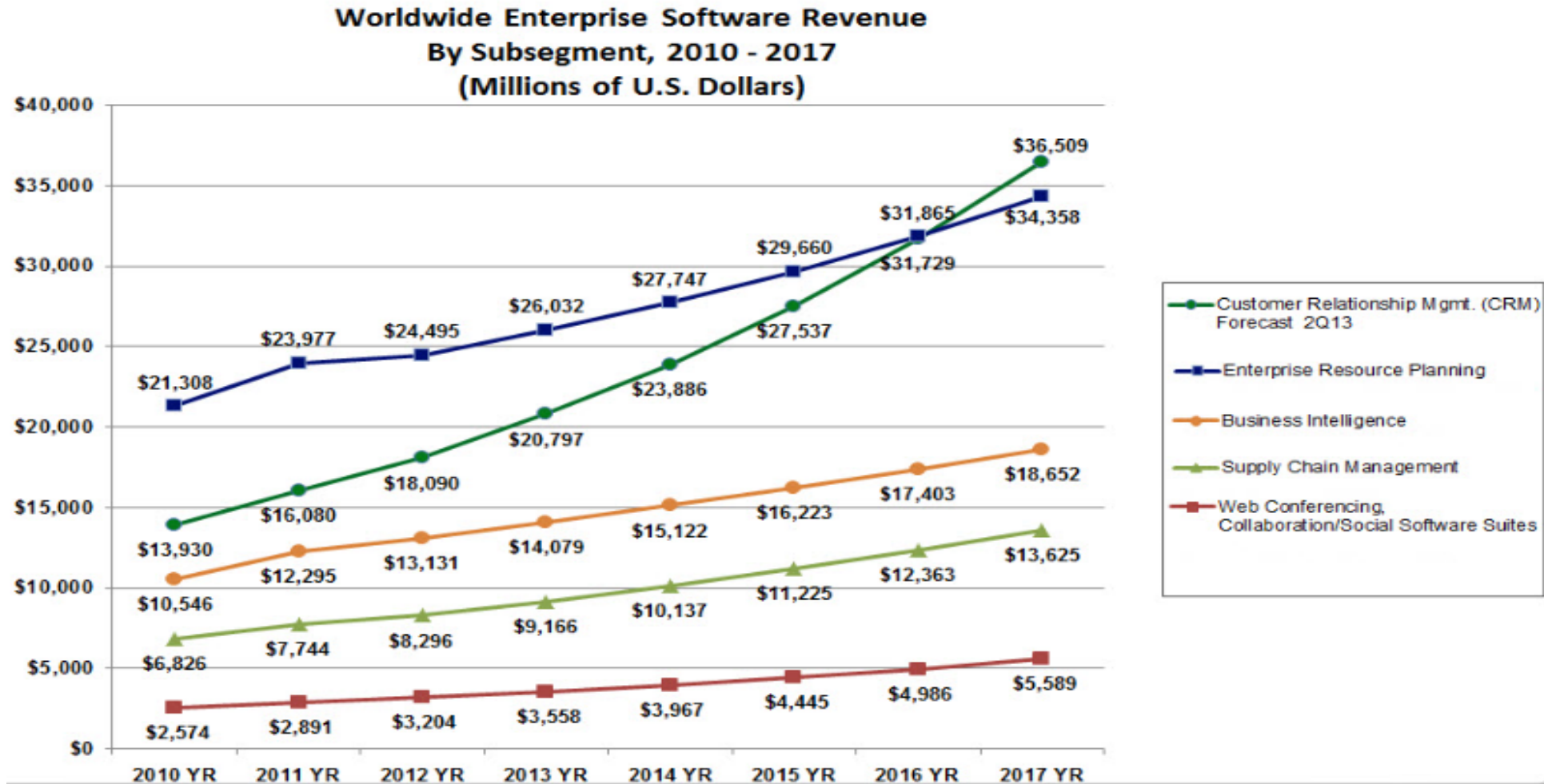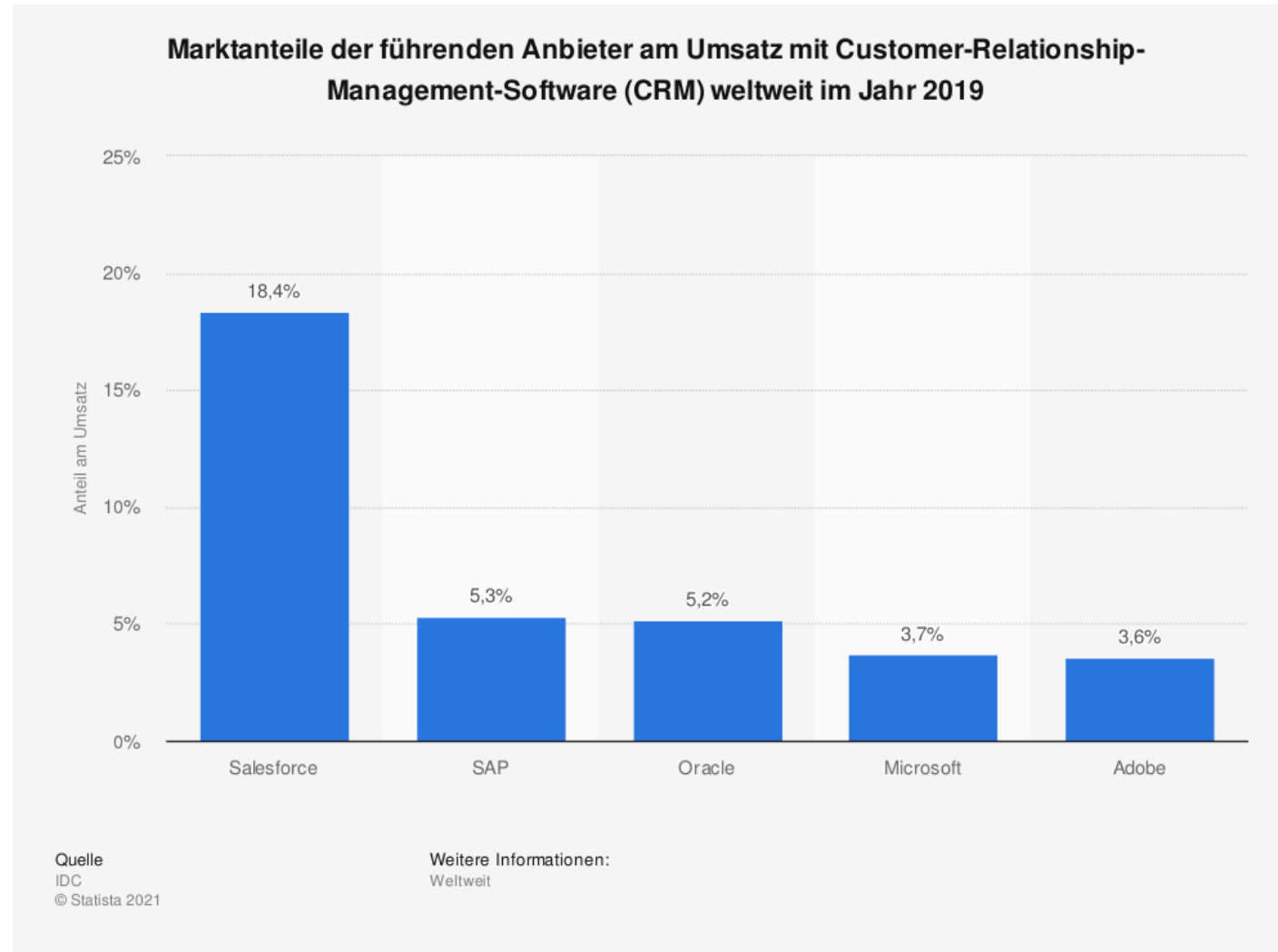| Standard functionality	Collection, access and management of customer data
	Management of tasks and appointments
	Management of distribution and sales opportunities, service requests and marketing campaigns
	Collaboration with group members to successfully close deals and serve customers
	(simple) Reporting

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TREND IN SOFTWARE INVESTMENTS: CRM OVERTAKES ERP

Worldwide Enterprise Software Revenue
By Subsegment, 2010 - 2017
(Millions of U.S. Dollars)

Legend:
- Customer Relationship Mgmt. (CRM) Forecast 2Q13
- Enterprise Resource Planning
- Business Intelligence
- Supply Chain Management
- Web Conferencing, Collaboration/Social Software Suites

Customer Relationship Management (CRM): $13,930; $16,080; $18,090; $20,797; $23,886; $27,537; $31,729; $36,509

Enterprise Resource Planning: $21,308; $23,977; $24,495; $26,032; $27,747; $29,660; $31,865; $34,358

Business Intelligence: $10,546; $12,295; $13,131; $14,079; $15,122; $16,223; $17,403; $18,652

Supply Chain Management: $6,826; $7,744; $8,296; $9,166; $10,137; $11,225; $12,363; $13,625

Web Conferencing, Collaboration/Social Software Suites: $2,574; $2,891; $3,204; $3,558; $3,967; $4,445; $4,986; $5,589

Years: 2010 YR, 2011 YR, 2012 YR, 2013 YR, 2014 YR, 2015 YR, 2016 YR, 2017 YR

Quelle: Forbes

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CRM APPLICATIONS MARKET SHARES 2019

Marktanteile der führenden Anbieter am Umsatz mit Customer-Relationship-Management-Software (CRM) weltweit im Jahr 2019

Anteil am Umsatz

Salesforce	SAP	Oracle	Microsoft	Adobe
18,4%	5,3%	5,2%	3,7%	3,6%

Quelle
IDC
© Statista 2021

Weitere Informationen:
Weltweit

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GARTNER MAGIC QUADRANT 2020

Figure 1. Magic Quadrant for the CRM Customer Engagement Center

CHALLENGERS | LEADERS

- Salesforce
- ServiceNow
- Pegasystems
- Microsoft
- Zendesk
- Oracle
- SAP
- Verint Systems
- Appian
- Freshworks
- Creatio
- SugarCRM
- eGain
- Zoho
- Kustomer
- CRMNEXT

ABILITY TO EXECUTE

NICHE PLAYERS | VISIONARIES

COMPLETENESS OF VISION

As of May 2020   © Gartner, Inc

Source: Gartner (June 2020)

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CRM IN PRACTICE

CRM IN PRACTICE

LEICA – SALESFORCE COMMUNITY CLOUD

VILLEROY & BOCH – SALESFORCE COMMERCE CLOUD
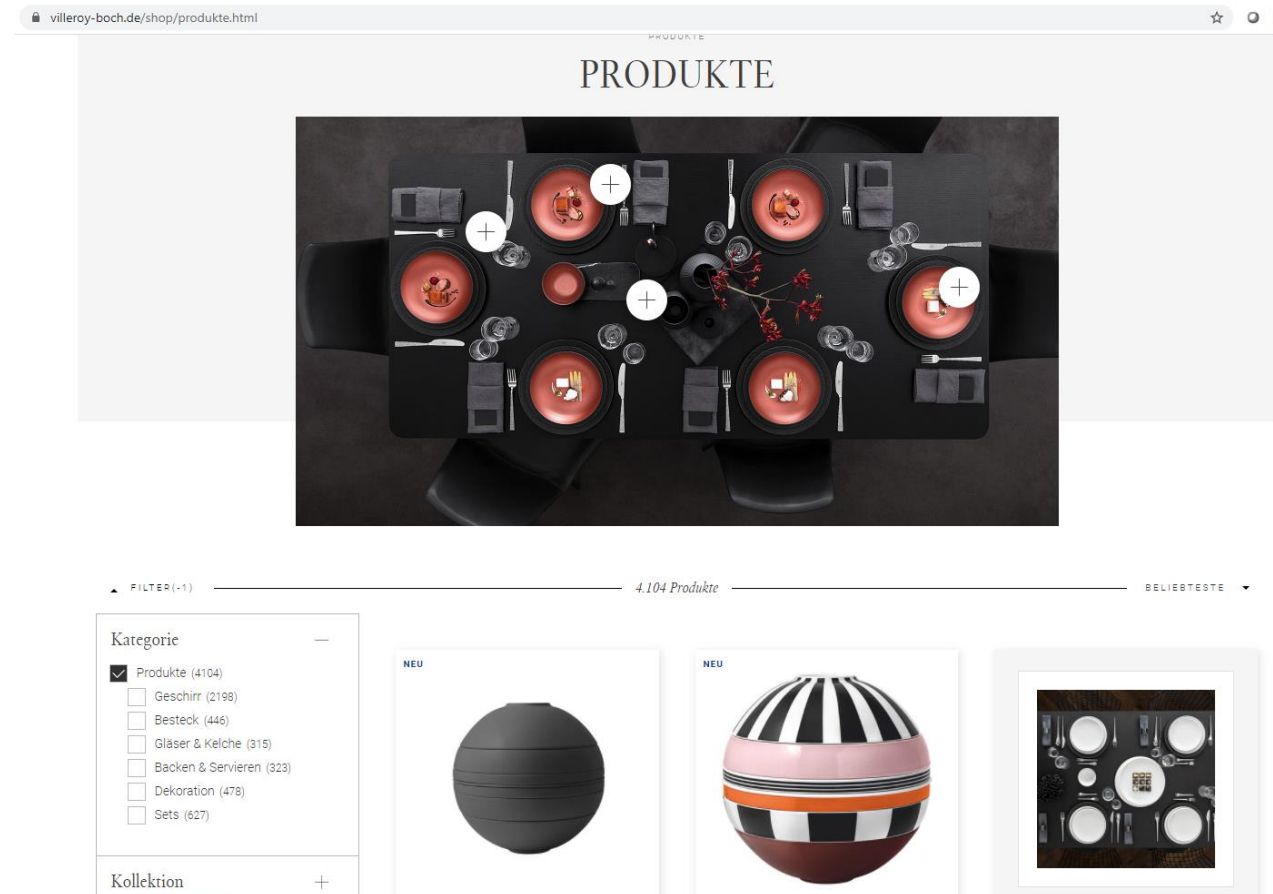
CJM – CUSTOMER JOURNEY MANAGEMENT

- Definition of CJM
- Customer Journey Mapping
- Moments that matter

PERSPECTIVE CHANGE TOWARDS THE CUSTOMER

FROM CRM TO CJM

Customer **Relationship** Management

Customer **Journey** Management
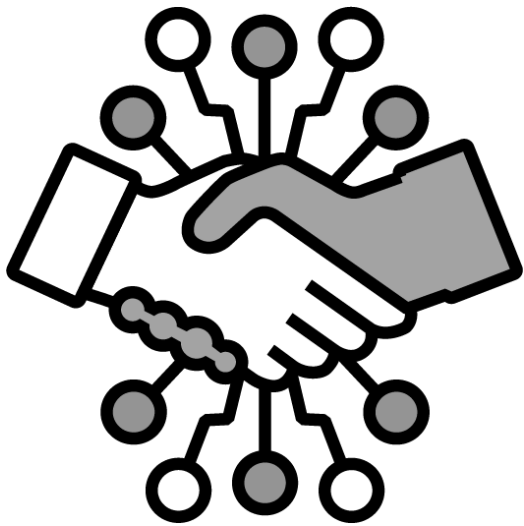
Transformation

= Relationship Management

= **INSIDE - OUT** View

= Experience Management

= **OUTSIDE - IN** View

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DEFINITION: CUSTOMER JOURNEY

Customer journey refers to the individual cycles and experiences that a customer goes through, from initiation to purchase to the use of a product or service.

The customer journey includes:

- all touchpoints, relevant processes and channels from the customer's perspective.
- Customers increasingly obtain information via indirect touchpoints where the opinion of third parties is obtained and thus escape the direct influence of companies.
- An in-depth understanding of the entire customer journey (including direct and indirect touchpoints) is a necessity for a customer-oriented marketing, sales, and service orientation.

„MOMENTS THAT MATTER" DETERMINE CUSTOMER SATISFACTION ALONG THE CUSTOMER JOURNEY.

NEED — **BUY** — **USE**

1. Attention
2. Consideration
3. Decision
4. Offer
5. Contract
6. Usage
7. Support
8. Recommendation
9. Renewal

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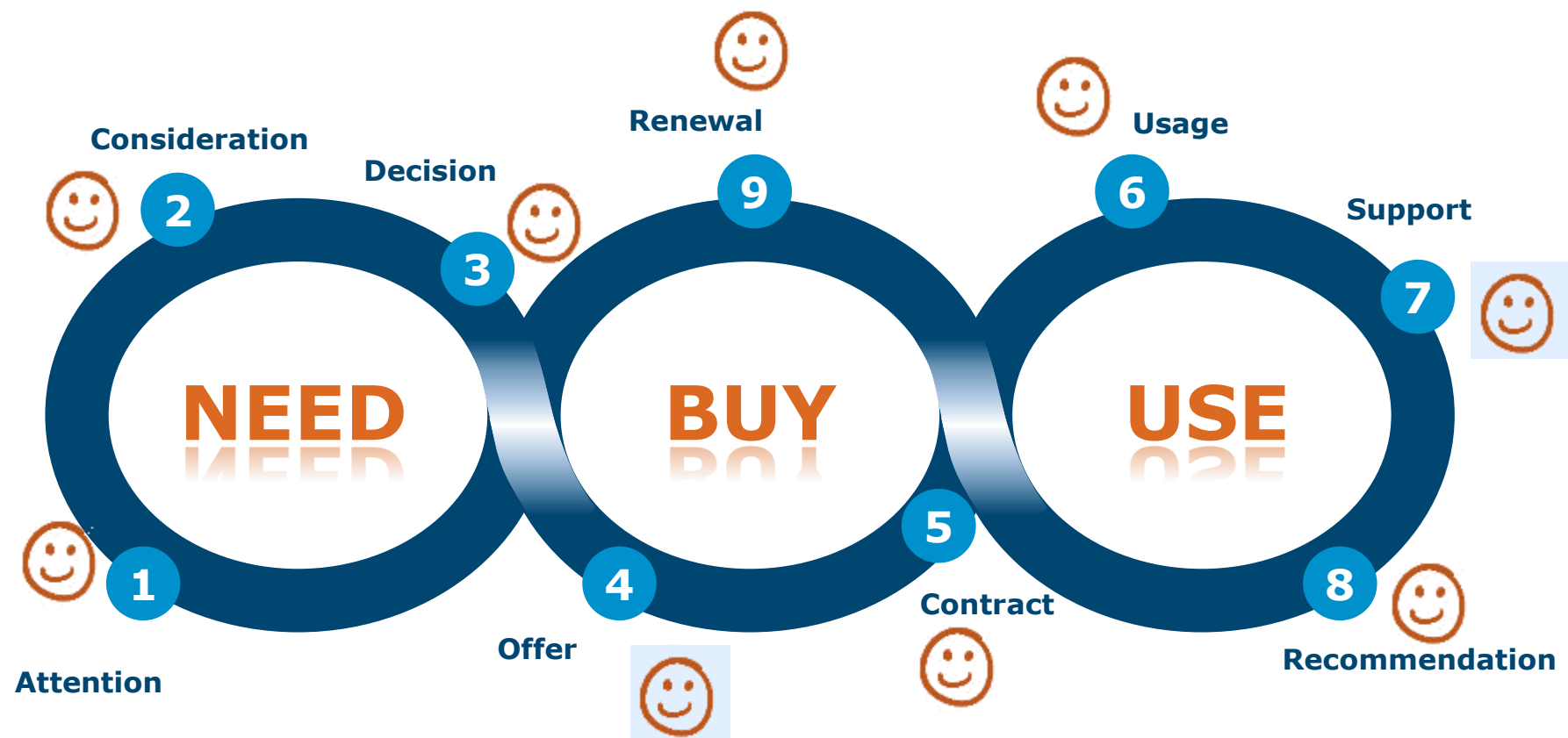
PRACTICAL EXERCISE: CUSTOMER JOURNEY
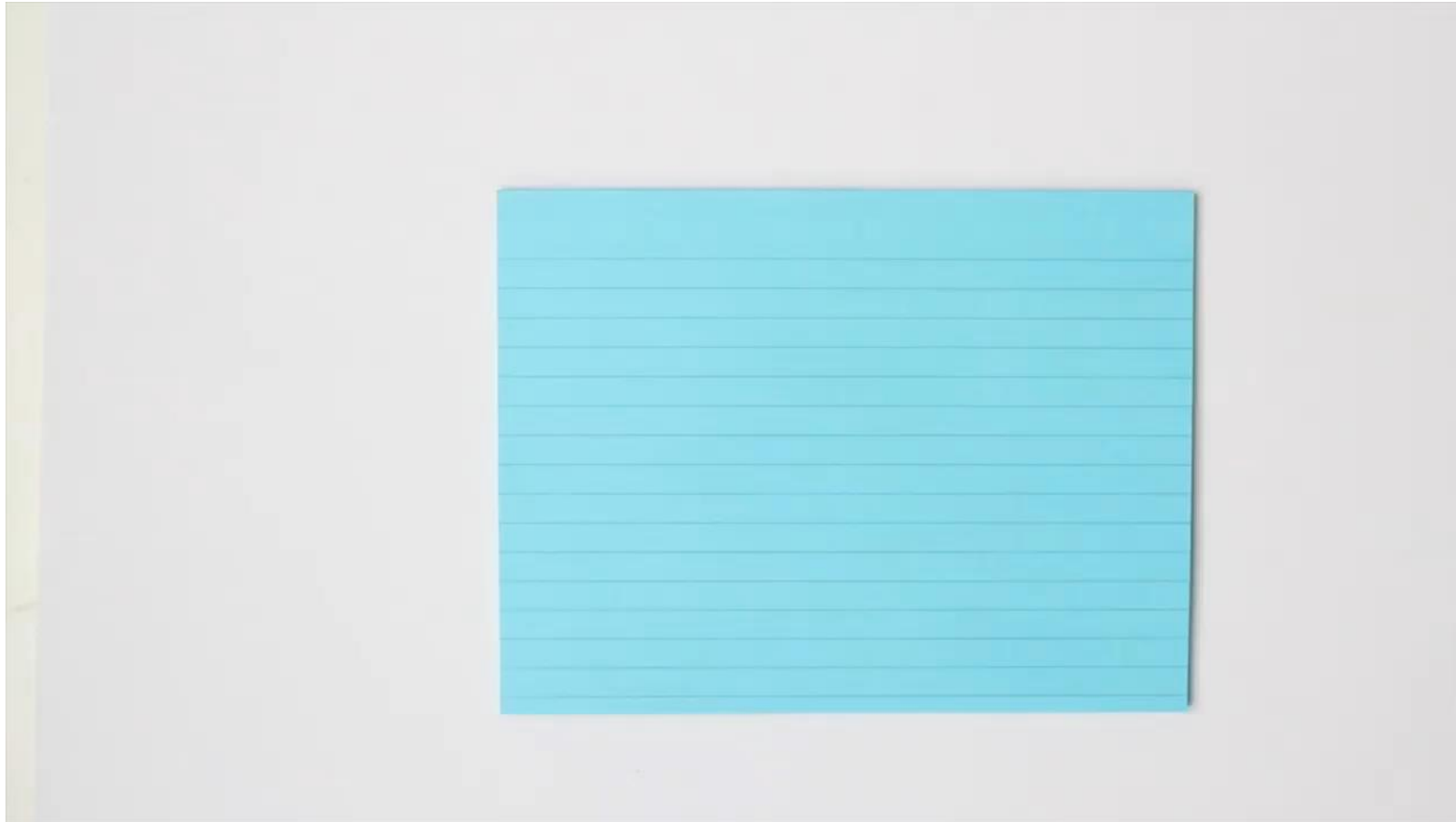
PRACTICAL EXERCISE: CUSTOMER JOURNEY

- Outline your „Customer Journey"

- 1-2 groups, 20 minutes

- Present the 3 recommendation for action with the greatest impact (flipchart/metaplan)

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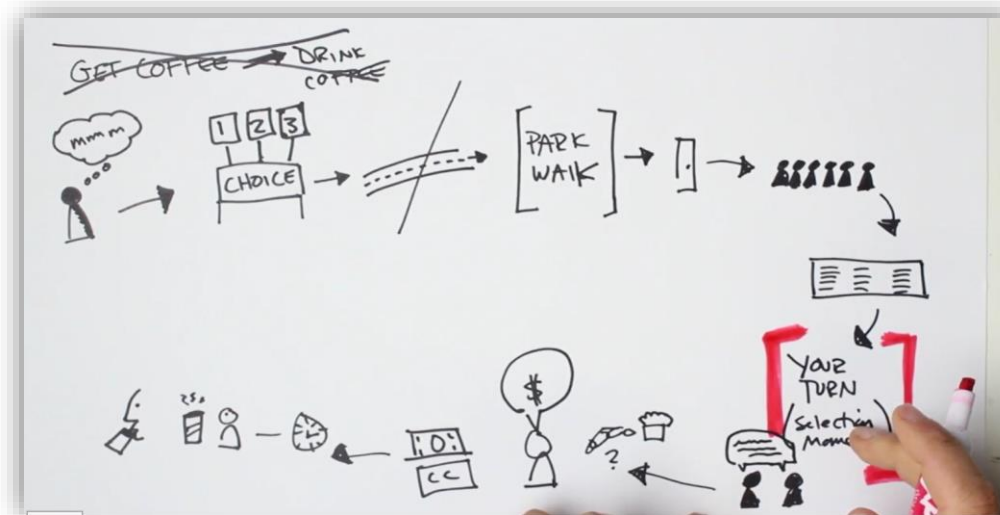
BREAKOUTS

Breakout 1	Breakout 2	Breakout 3
Katharina Jakisch	Clara Ben-Amor	Delia Chiritescu
Cem Polat	Ayse Basma	Stoycho Kapsazov
Magdalena Bronner	Velislava Petrova	Christo Mitzkov
Vaidehi Dabir	Antonina Syarova	Lorena Gutiérrez

AN ACTIVE CUSTOMER JOURNEY MANAGEMENT HARMONIZES CUSTOMER AND BUSINESS PERSPECTIVES.

Customer perspective (Customer Journey)
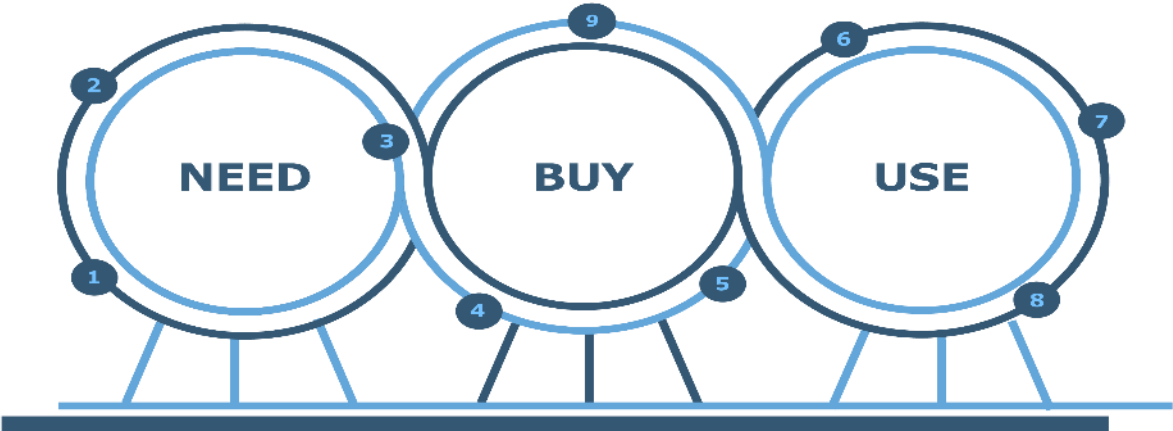
NEED   BUY   USE

Company perspective (classic CRM processes)

NEED	BUY	USE
1. Attention: Search for information about products/solutions **2. Consideration**: Initial evaluation of the products/solutions **3. Decision**: Decision to purchase a specific product/solution	**4. Offer**: To make/request an offer **5. Contract**: To negotiate/enter into a contract **9. Renewal**: Extend/renew a contract	**6. Usage**: Use a product/receive a service **7. Support**: Support the service through the customer support **8. Recommendation**: Recommend products/brand/company to others
Marketing	**Sales**	**Service**

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Chapter 3

CRM-PROCESSES

- Marketing
- Sales
- Service

AN ACTIVE CUSTOMER JOURNEY MANAGEMENT HARMONIZES CUSTOMER AND BUSINESS PERSPECTIVES.

Customer Journey

NEED

- **Attention**: Search for information about products/solutions
- **Consideration**: Initial evaluation of the products/solutions
- **Decision**: Decision to purchase a specific product/solution

- Lead management
- Lead generation
- Lead scoring
- Lead nurturing
- Lead routing
- Conversion strategies
- Social advertisement
- Content marketing
- Inbound marketing

Marketing Excellence

Customer Journey Management

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MARKETING - HOW CAN COMPANIES INFLUENCE THE CUSTOMER JOURNEY FROM INITIAL CONTACT WITH THE BRAND TO PURCHASE?

Stimulus

ZMOT

First Moment of Truth

Second Moment of Truth

Qualification

Verify

Generation

Routing

Purchase

Inquiry

Interested party

Marketing Qualified Lead (MQL)

Sales Accepted Lead (SAL)

Sales Qualified Lead (SQL)

$$

Marketing validates the interest

Marketing develops the lead

Sales department reviews and takes the lead

Sales department checks for BANT criteria

Sales department completes the purchase

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AN ACTIVE CUSTOMER JOURNEY MANAGEMENT HARMONIZES CUSTOMER AND BUSINESS PERSPECTIVES.

Customer Journey

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BUY

- **Offer:** To make/request an offer
- **Contract:** To negotiate/enter into a contrac
- **Renewal**: Extend/renew a contract

- Planning and prognosis
- Chances management
- Offer management
- Order management
- Price management
- Product management
- Incentive and commission mgmt
- Contract management
- Territory management

Sales Excellence

Customer Journey Management

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SALES – DISTRIBUTION PROCESS AS A SALES FUNNEL

Receive contact information (SAL)	Lead qualifies(SQL)	Identify target customer	Recognize opportunity	Inquiry	Inquiry clarified	Offer shipped	Order
1	**2**	**3**	**4**	**5**	**6**	**7**	
Record and qualify lead	Get in contact and qualify	Extend contact and maintain	Check customer concerns	Clarify inquiry	Create an offer	Track offer	Process an order

Leadmgmt.	Contact management	Offer management	Order management

Definition Lead:

A lead represents a potential opportunity identified in the foreseeable future to enter into a business relationship with a potential customer.

Definition Opportunity:

An opportunity is a specific possibility to do business with a potential customer, in an already identified application field.

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AN ACTIVE CUSTOMER JOURNEY MANAGEMENT HARMONIZES CUSTOMER AND BUSINESS PERSPECTIVES.

Customer Journey

NEED	BUY	USE

NEED
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BUY
- Planning and prognosis
- Chances management
- Offer management
- Order management
- Price management
- Product management
- Incentive and commission mgmt
- Contract management
- Territory management

USE
- Service inquiry management
- Warranty management
- Assent and inventory management
- Complaint management
- Returns and spare parts
- Service contract management

Marketing Excellence | Sales Excellence | Service Excellence

Customer Journey Management

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SERVICE IS THE LARGEST CRM SUBSEGMENT (BY LICENSE REVENUE)
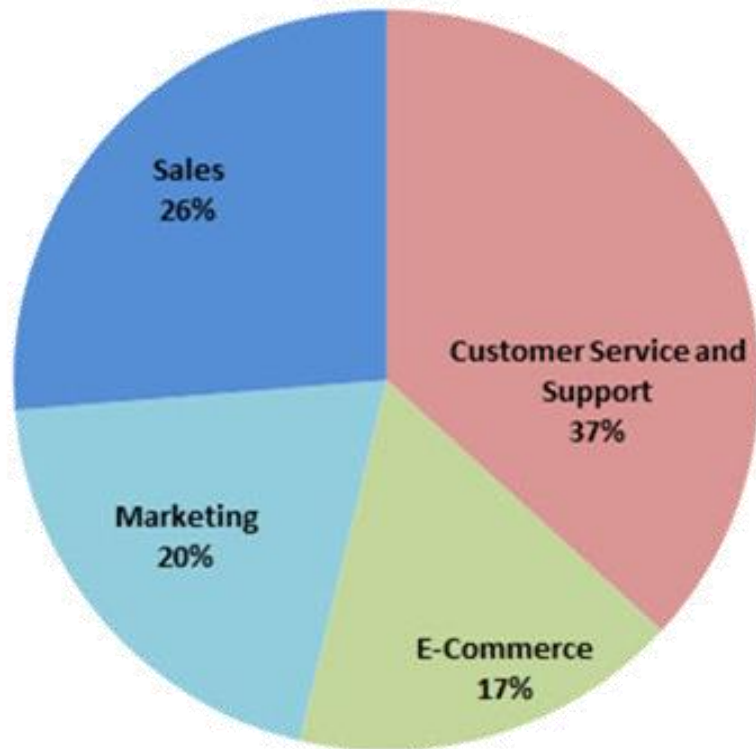
CRM Software Spending By Subsegment
Total Software Revenue, Worldwide 2012
Market Size: $18B; 12.5% Growth over 2011

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AN EXPERIMENT: IDENTICAL REQUEST TO THE DEUTSCHE BAHN CUSTOMER SERVICE VIA 3 CHANNELS.

"WILL I RECEIVE A COMPENSATION IF I MISS MY FLIGHT DUE TO A TRAIN DELAY?"

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REQUEST TO THE DEUTSCHE BAHN CUSTOMER SERVICE 1/3 „WILL I RECEIVE A COMPENSATION IF I MISS MY FLIGHT DUE TO A TRAIN DELAY?"

1. DB's Twitter team:

Annekatrin Mohr @amohr28   21 Dez
@DB_Bahn Hallo, was sind meine Fahrgastrechte, wenn ich wegen einer Verspätung über 1 h od Zugausfall mein Flugzeug verpasse?
Schließen   ← Antworten   🗑 Löschen   ★ Favorisieren

4:39 PM - 21 Dez 11 · Details

DB Bahn @DB_Bahn   21 Dez
@amohr28 Durch die geltenden Fahrgastrechte wird nur der Zugausfall bzw. die Verspätung ab 1 Stunde entschädigt. Keine Flugumbuchung. /ch
Öffnen

Annekatrin Mohr @amohr28   21 Dez
@DB_Bahn Das heißt, ich trage das volle Risiko?
💬 Gespräch verbergen   ← Antworten   🗑 Löschen   ★ Favorisieren

5:29 PM - 21 Dez 11 · Details

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2. DB's Facebook-Team:

Hallo, ich habe eine Frage: Erhalte ich eine Entschädigung, wenn ich wegen Zugverspätung meinen Flug verpasse?

Gefällt mir · Kommentieren

DB Bahn Hallo Annekatrin Mohr, wenn der Flug durch die Verspätung eines Zuges verpasst wird, greifen nur die üblichen Entschädigungsrichtlinien laut den Fahrgastrechten. Eine Übernahme der Flugkosten oder ähnliches ist demnach nicht möglich. /si
vor etwa einer Stunde · Gefällt mir

Chris Babsek Wenn aber bei einer Pauschalreise dein Bahnticket mit inbegriffen ist, dürftest du größere Chancen haben, da noch ranzukommen.
vor 19 Minuten · Gefällt mir

Kai Lösch Und was sagt dir das .... Verlasse dich nicht auf die bahn.... Sonst ist man verlassen ^^
vor 11 Minuten via Handy · Gefällt mir

Michael Reibestein Oder plane genug Puffer ein. Kann mit dem Auto genau so passieren.
vor 10 Minuten · Gefällt mir

Chris Babsek Nunja, ganz so würde ich das auch nicht sagen. Wer im Stau stehen bleibt hat nochmal bedeutend mehr Pech. Was es uns sagt: Immer rechtzeitig zum Flughafen fahren!
vor 10 Minuten · Gefällt mir · 1

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3. „Traditionally" by e-mail:

Sehr geehrte Frau Mohr,

vielen Dank für Ihre E-Mail.

Bei Zugverspätungen und -ausfällen gelten einheitliche, gesetzlich geregelte Fahrgastrechte. Die Reisenden aller Eisenbahnunternehmen in Deutschland haben damit die gleichen Entschädigungsansprüche.

Viele Bahnunternehmen haben deshalb gemeinschaftlich das „Servicecenter Fahrgastrechte" eingerichtet und mit der Bearbeitung der verspätungsbedingten Entschädigungsansprüche ihrer Fahrgäste beauftragt.

Bitte wenden Sie sich mit Ihrem Anliegen daher schriftlich an das Servicecenter:

Servicecenter Fahrgastrechte
60647 Frankfurt am Main

Um eventuelle Rückfragen zu vermeiden, welche die Bearbeitung und Auszahlung der Entschädigung verzögern, empfehlen wir Ihnen die Verwendung des Fahrgastrechte-Formulars. Unter www.bahn.de/fahrgastrechte finden Sie das Formular auch online sowie weitere Informationen zur Geltendmachung Ihrer Ansprüche.

Wenn Sie noch Fragen dazu haben, erreichen Sie das Servicecenter unter der Rufnummer 0180 5 20 21 78 (14 ct/Min. aus dem Festnetz via Vodafone, Tarif bei Mobilfunk max. 42 ct/Min.) täglich in der Zeit von 6 Uhr bis 22 Uhr.

Per E-Mail ist das Servicecenter Fahrgastrechte nicht erreichbar.

Wir wünschen Ihnen erholsame Weihnachtsfeiertage und einen guten Start in das Jahr 2012.

Mit freundlichen Grüßen
Im Auftrag

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CUSTOMER JOURNEY AND CRM PROCESSES

- Map your customer journey to the associated CRM processes

- Consider how to make a meaningful transition from one area to the other to minimize friction losses

Chapter 4

CUSTOMER ANALYTICS / BUSINESS INTELLIGENCE

- Measuring success via KPIs
- Data-driven customer analytics
- Principles of intelligent customer analytics
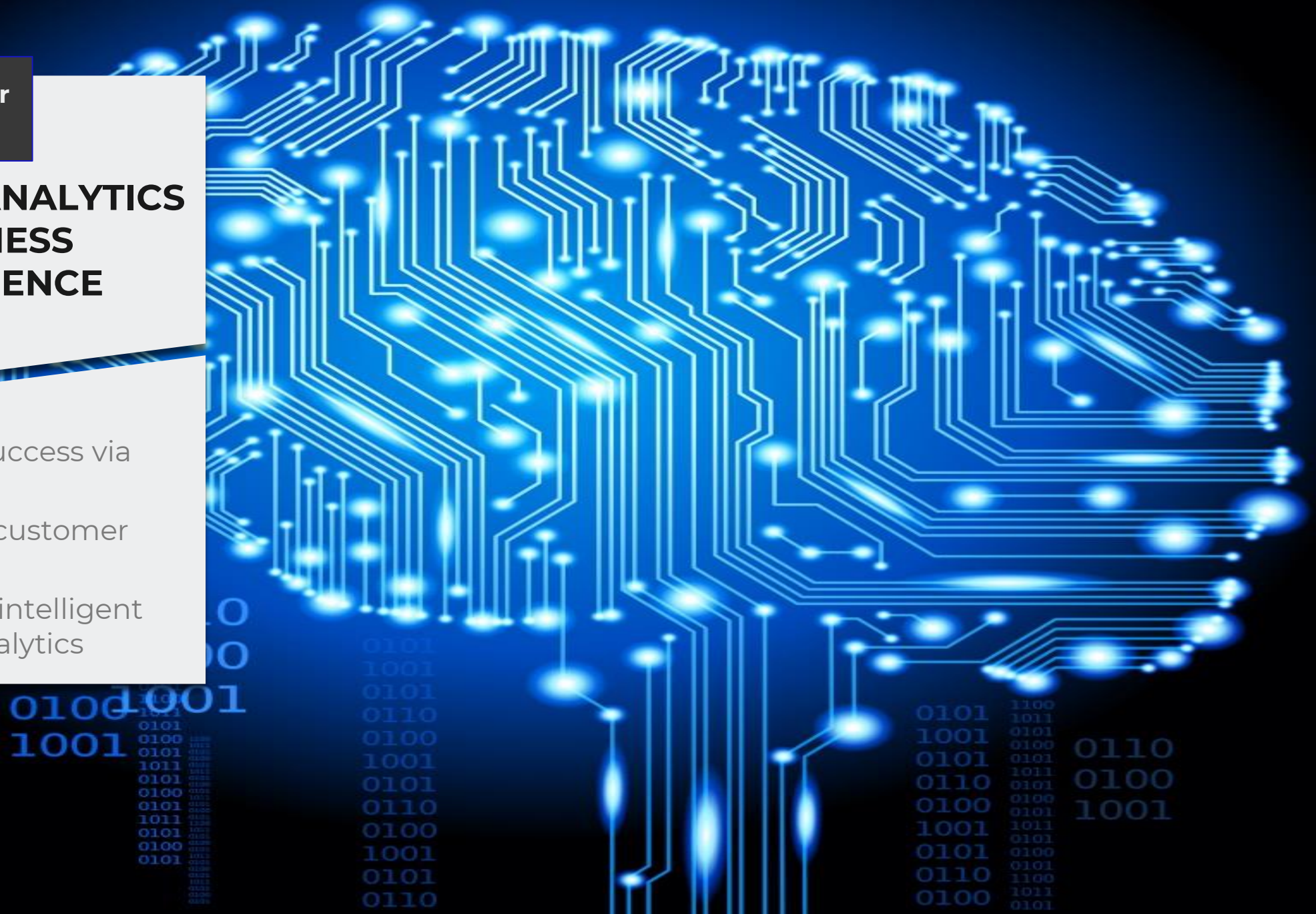
CUSTOMER ANALYTICS & BUSINESS INTELLIGENCE PROCESSES

How can I optimize my marketing, sales and service processes and better align them with customer needs?

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SUCCESS MEASUREMENT - KPIS: IN ACCORDANCE WITH THE RELEVANT TARGET GROUP
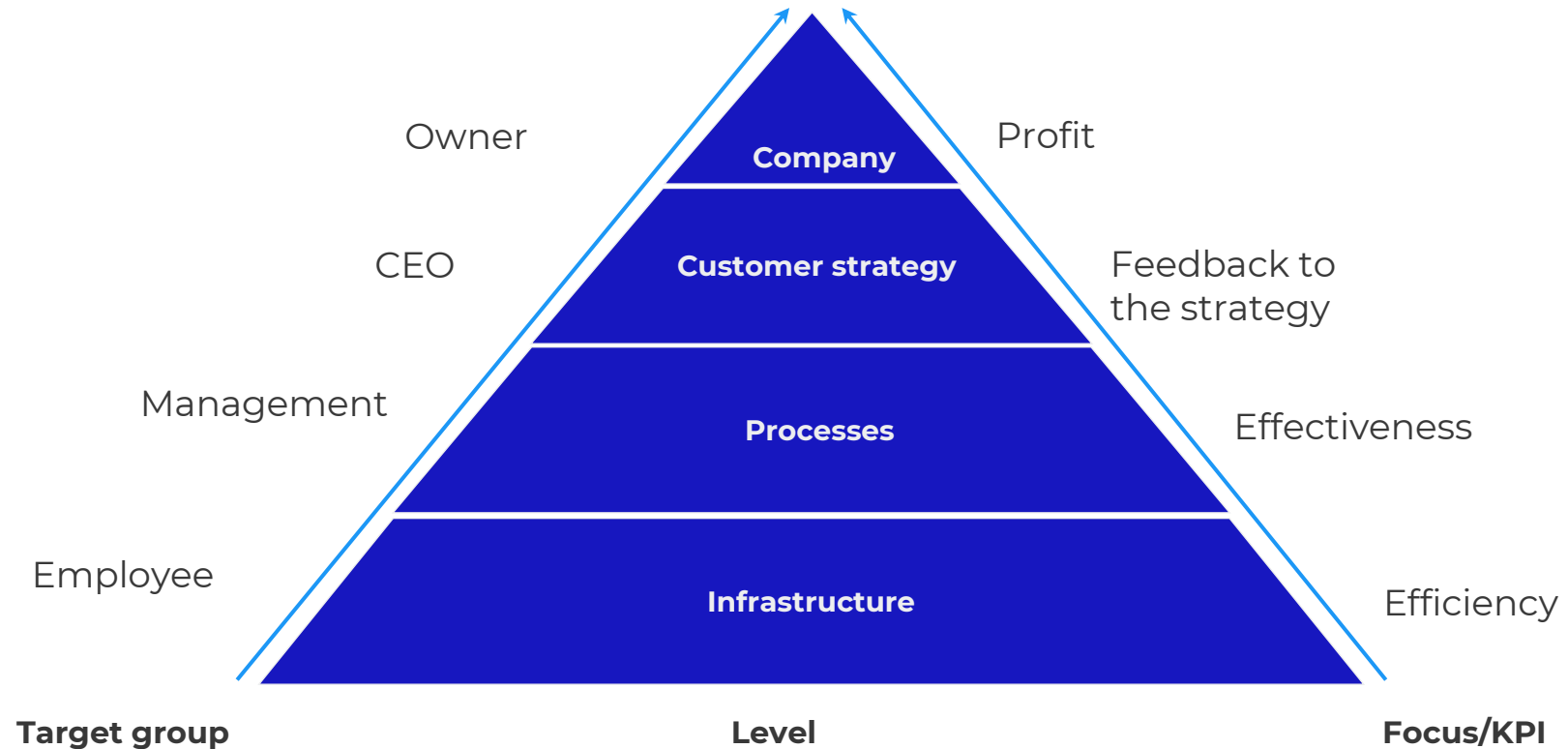
Image 47 CRM- Messgrößen in der Unternehmensstruktur (Source: Thompson, Ed: Eight Building Blocks of CRM: The Essential Elements of CRM Success, Stamford 2005, p.18)

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MEASURES TO INCREASE REVENUE AND REDUCE COSTS

"A dollar earned in the market increases the value of the company more than a dollar that comes into the cash register as a result of fewer costs."

Cost reduction	Increase in sales
▪ Reduction of process costs ▪ Reduction of administrative activities ▪ Increase of the self-service level ▪ Learning effects through data analysis ▪ Lower marketing costs through targeted campaign management and thus reduced wastage	▪ Cross- / Upselling ▪ Higher conversion rates ▪ Lower price sensitivity ▪ Recommendation to third parties ▪ Increased purchase frequency

Image 9 – Potenzialbetrachtung (Source: Henn, 2001)

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MATURITY MODEL OVER 4 PHASES FOR DATA-DRIVEN CUSTOMER ANALYTICS

1. What happened?

Descriptive
Analytics

Reports &
Dashboards

2. Why did it happen?

Diagnostic
Analytics

Interactive
Visualizations

3. What happens next?

Predictive
Analytics

Advanced
Analytics

4. Suggested action?

Prescriptive
Analytics

Intelligent
Operations
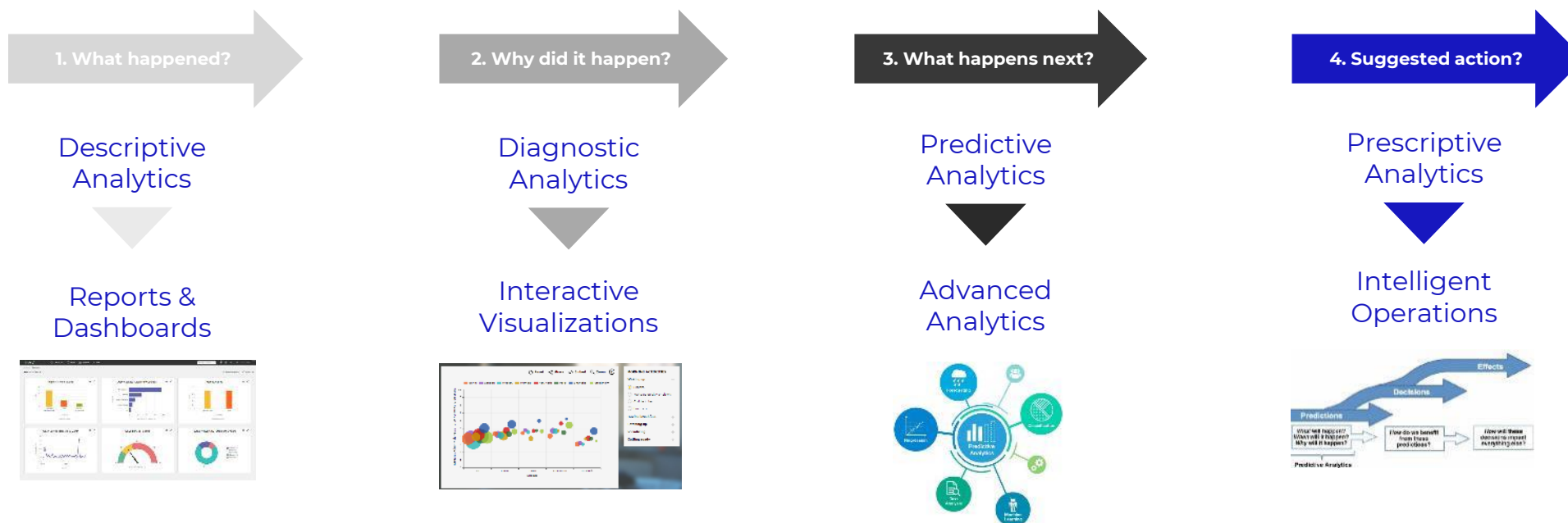
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THE GENERAL PRINCIPLE OF INTELLIGENT CUSTOMER ANALYTICS

Example:

1. Collect Data

1. Collect data, e.g. on campaign execution, attendees, click-rates, etc.

2. Artificial Intelligence
- ➢ Machine Learning
- ➢ Recognize patterns
- ➢ Create forecast

Develop actions

2. This data is analized with datadriven analytics as descriptive, diagnostic, predictive and prescriptive approaches
   a. to understand what happend and why it happend and
   b. to predict what happens next and what will be the next best actions on this prediction.

3. Optimization
- ➢ Costs
- ➢ Sales

1. Evaluate the impact of these actions.

4. Operation
- ➢ Provision, e.g. Cloud

2. Operationalize the actions.

5. Measure actions and repeat

3. Measure the success of the operationalization and collect the corresponding data -> step 1

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MEASURING THE SUCCESS OF THE RECOMMENDED ACTIONS

- Customer Journey recommended actions

- Think about how you can measure success?

Chapter 5

DIGITAL TRANSFORMATION

- Mega trends
- Definition of digital transformation
- Impact of the digital transformation

MEGA TRENDS INFLUENCE CUSTOMER NEEDS, COMPANIES AND THE ECONOMY

IOT – Internet of Things
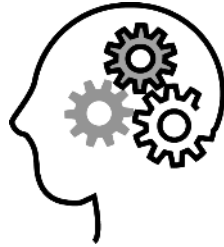
Artificial **I**ntelligence

BIG DATA and Analytics
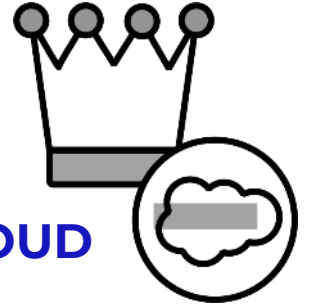
CLOUD

SOCIAL MEDIA
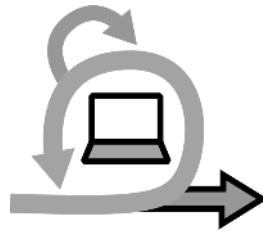
AGILE / Dynamic

MOBILITY

SUSTAINABILITY

HEALTH

They **force** companies to **adapt** – to **transform** – in order to **survive**.

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THE DIGITAL TRANSFORMATION …

… INFLUENCES EVERY COMPANY IN ITS CULTURE, STRATEGY, STRUCTURE AND PROCESSES AND THUS ALSO THE CUSTOMER EXPERIENCE.

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DEFINITION DIGITAL TRANSFORMATION

Digital transformation refers to the change in companies and the economy as a result of the digital revolution.

The change is strongly influenced by the factors of digitality, mobility, cloud and social networking

The digital transformation results in
a different understanding of

- Customers,

- Business relationships and

- Value chains.

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CHALLENGES OF THE DIGITAL TRANSFORMATION

Challenges lie primarily in

- the right digital strategy
- the effective conceptual integration
- in professional knowledge management
- a flexible corporate culture and
- rapid integration into the IT structure

Success factors

- A clear vision for the future business and business model.
- Investments in modern IT & systems to exploit their potential
- Changes must be supported by top management and systematically implemented and tracked.

MEGA TRENDS HAVE FUNDAMENTALLY CHANGED CUSTOMER BEHAVIOR AND NEEDS

CORPORATE GOALS

DIGITAL TRANSFORMATION

AUTOMATISATION

PERSONALISATION

MEGA TRENDS

SOCIAL

CLOUD

ANALYTICS

MOBILE

IoT

CUSTOMER NEEDS

FAST

EFFICIENT

RELEVANT

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IN THE PAST: CRM FOCUSED ON THE CUSTOMER RELATIONSHIP AND WAS LIMITED TO A FEW INTERACTION CHANNELS

OUTBOUND CAMPAIGNS

CALL CENTER

SHOP

DIRECT SALES

FIELD SERVICE

CUSTOMER RELATIONSHIP MANAGEMENT
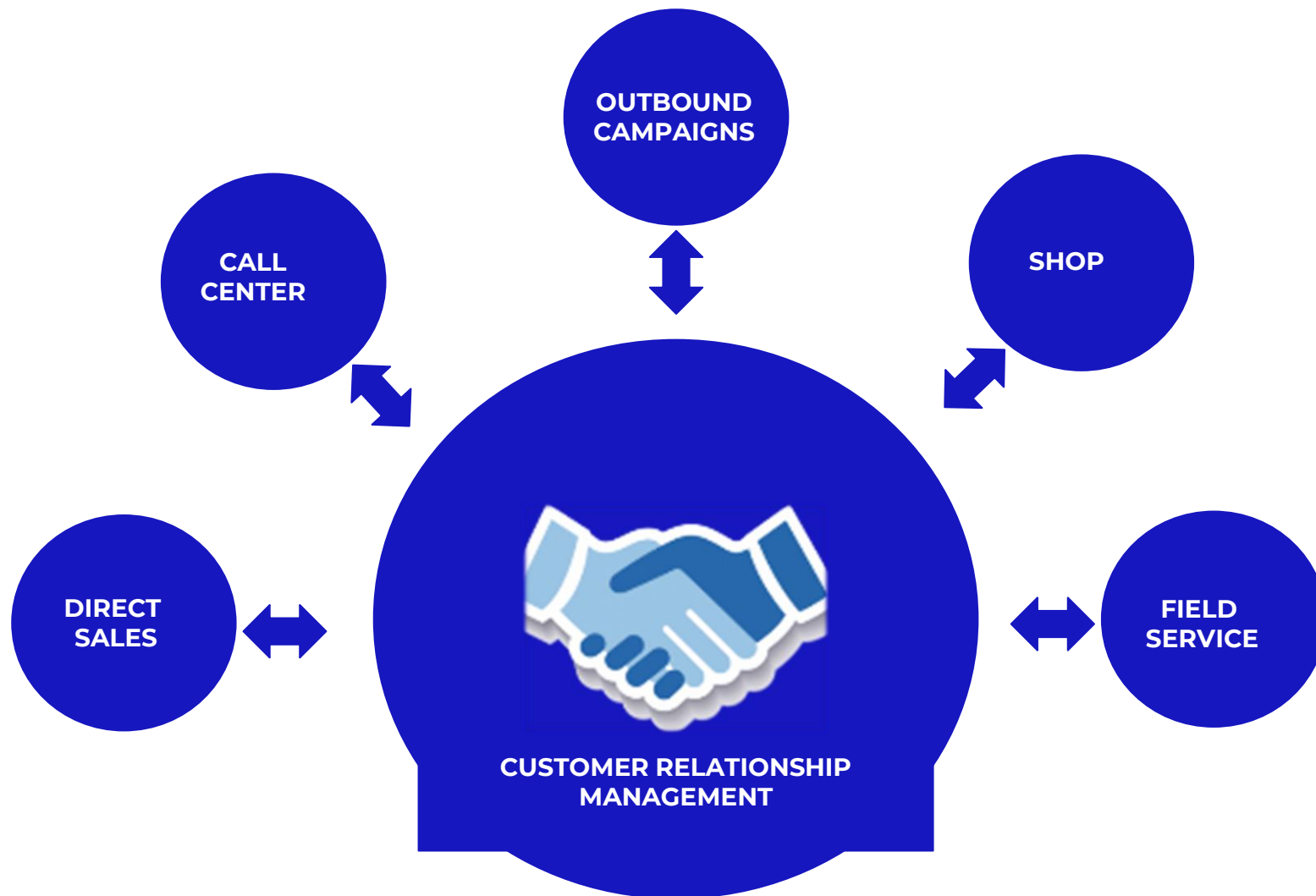
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NO LONGER "MANAGING CUSTOMER RELATIONSHIPS", BUT CREATING A PERSONALIZED CUSTOMER EXPERIENCE!

OUTBOUND CAMPAIGNS

CALL CENTER

SHOP

DIRECT SALES

CUSTOMER RELATIONSHIP MANAGEMENT

FIELD SERVICE

MEGA TRENDS

SOCIAL

CLOUD

ANALYTICS

MOBILE

IoT

MEGA TRENDS

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DIGITAL TRANSFORMATION DEMANDS A CHANCED CRM STRATEGY

- CRM decision-makers see a clear need for action in the further development of their CRM solutions
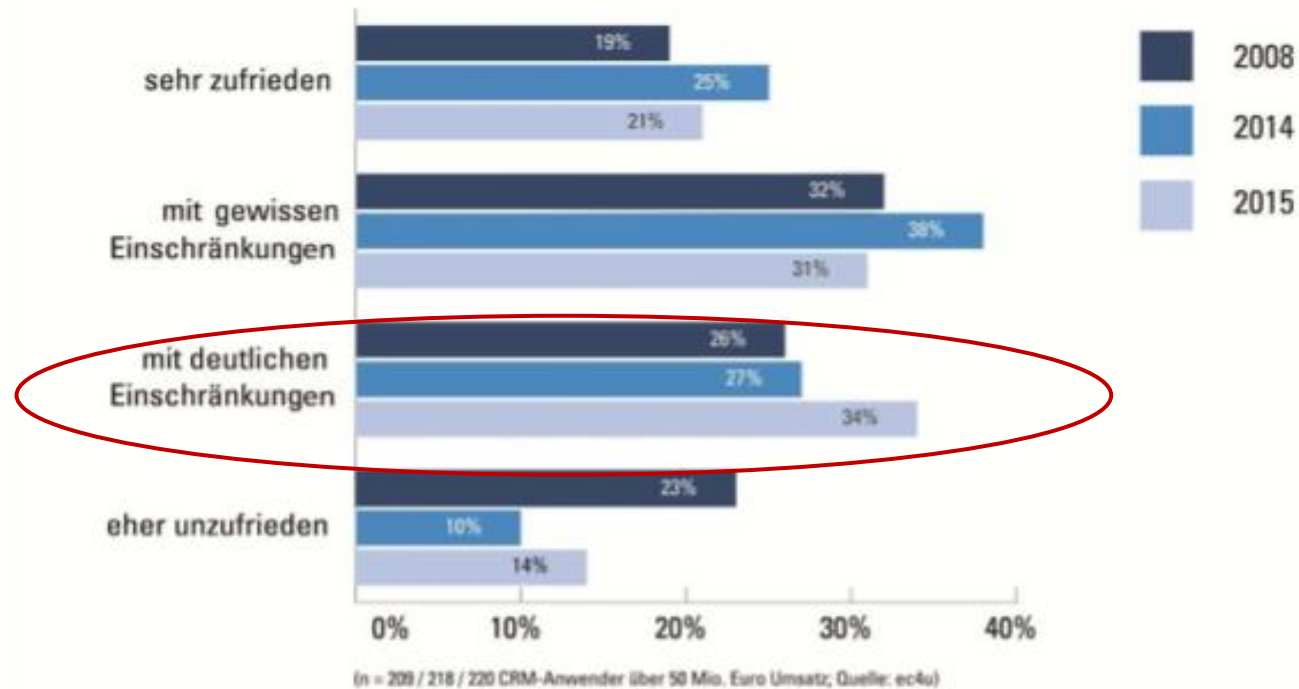
Abbildung 1: CRM-Zufriedenheit

Source: Study „Digitale Transformation verlangt veränderte CRM-Strategien" (ec4u)

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DIGITAL TRANSFORMATION DEMANDS A CHANCED CRM STRATEGY

- Processes must be further optimized
- But the strategy must also be fundamentally realigned

Welche Maßnahmen haben Sie für die nächsten zwei Jahre zur Optimierung geplant?

Maßnahme	2008	2014	2015
Neuausrichtung der CRM-Strategie	51%	59%	62%
neues CRM-System	18%	29%	32%
Optimierung der CRM-Prozesse	54%	64%	71%
Intensivierung der Benutzerschulung	48%	41%	35%
andere Optimierungs-maßnahmen	22%	35%	39%
keine	17%	14%	11%

(n = 209 / 218 / 220 CRM-Anwender über 50 Mio. Euro Umsatz; Mehrfachnennungen möglich; Quelle: ec4u)

Abbildung 3: Geplante CRM-Maßnahmen

Source: Study „Digitale Transformation verlangt veränderte CRM-Strategien" (ec4u)

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INTERACTION OF TECHNOLOGICAL CHANGE AND NEW BUSINESS MODELS

Turn of the millenium

- Business-follows-IT
- CRM software causes problems as well as benefits (budget overruns, ROI takes longer, 50% unsuccessful projects)
- Introduction of open source CRM software
- Introduction of CRM SaaS Software

Since 2010

- IT goes Cloud
- Cloud solutions find their way
- Custom software is becoming too expensive to reflect global trends
- Standard platforms with a high range of functions are gaining importance
- Integrations-requirements grow
- Mobility and collaboration carry a greater weight

2015+

- IT-follows-Business
- Companies must optimize their omni-channel and their customer journey to strengthen competitiveness
- Digitalized customer relationships
- Processual integration of marketing, sales and service
- User experience in the familiar "office" context/easy operation
- Mobility and collaboration (e.g., integration of Skype ...) are common practices

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PROJECT MANAGEMENT:
HOW ARE CRM PROJECTS CHANGING?

Cloud based

Mobile Apps

Virtual, inter-national

CRM-PROJECTS

Agile

Short Time-to-market

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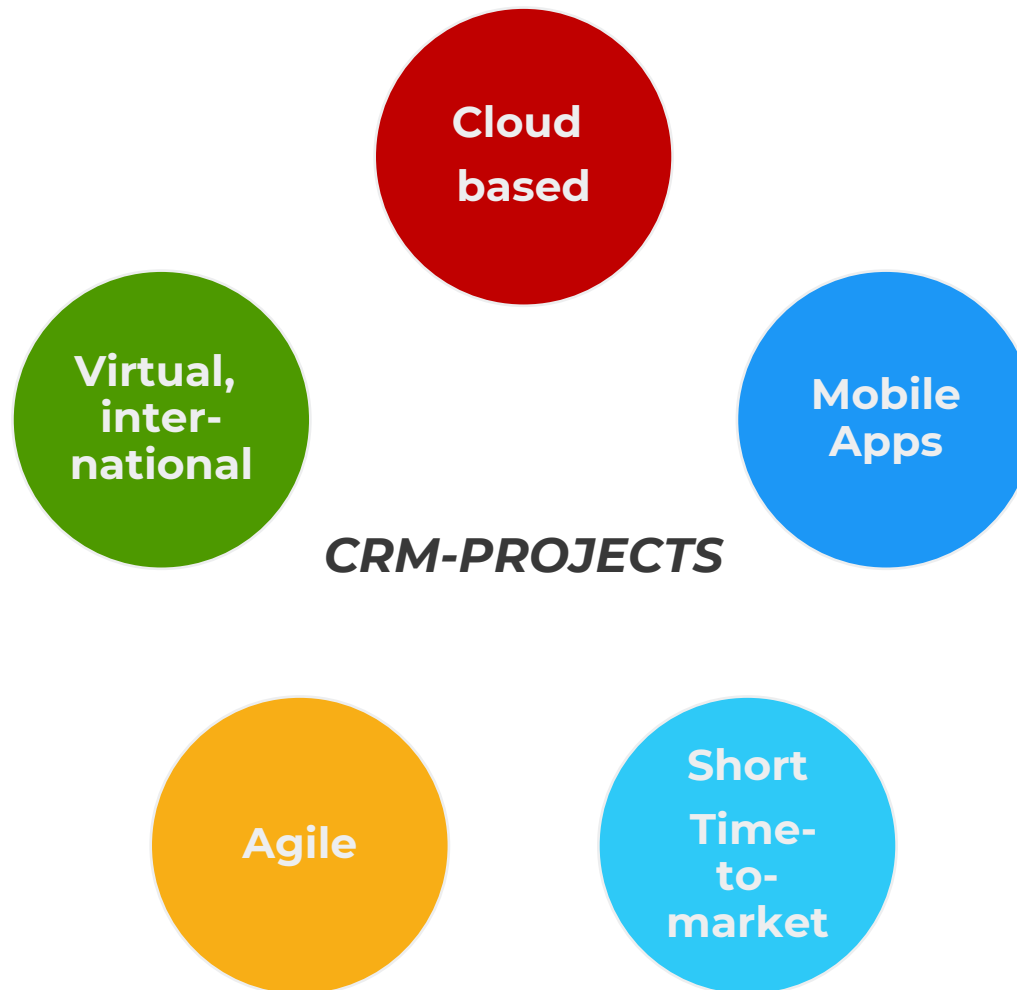
PROJECT MANAGEMENT: WATERFALL VS. AGILE

Waterfall

Analysis → Design → Build → Test → Rollout → Release

Agile

| Sprint 1 | Sprint 2 | Sprint 3 | Sprint 4 | Sprint 5 | Sprint 6 |

4 wks | 4 wks | 4 wks | 4 wks | 4 wks | 4 wks

Release — Release

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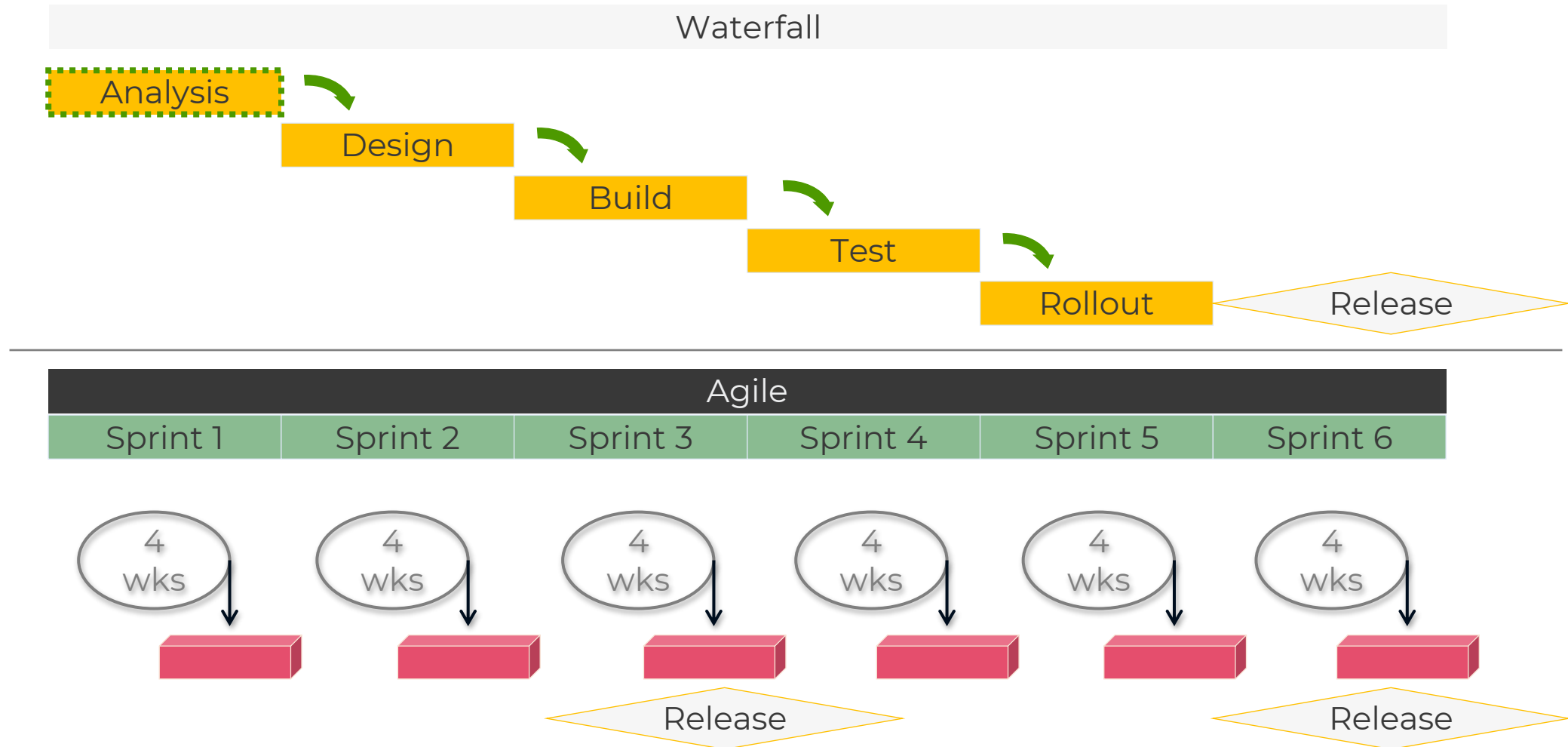
Chapter 6

CHANGE MANAGEMENT

- Challenges
- Managing change
- Success factors

EMPLOYEES AND CULTURE

The expectations of management and the emotions of the affected employees form a field of tension

High expectations

· Efficiency Increase

· Process optimization

· Customer loyalty

· Strategic considerations

· Overview

Fear

· Relearn

· Competence change

· Rationalization

· Transparency

· Claim

• Loss of function

Management

Employees

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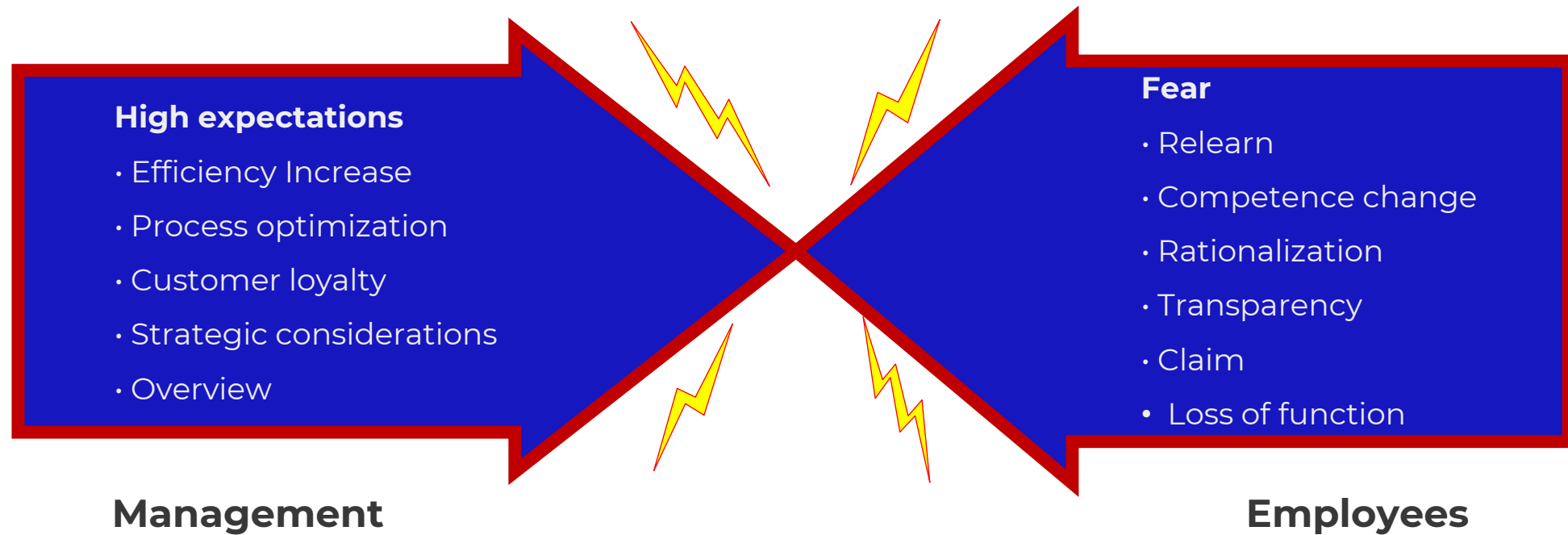
EMPLOYEES AND CULTURE – SHOWING POTENTIAL AND ADVANTAGES

- The expectations of management regarding increased efficiency, process optimization and customer loyalty must not only be communicated to the employee, but the operationalization must be discussed with the responsible employees and what part they play in this.

- Employees must be made less fearful of change through transparency, fairness and support.

- The goal is for the employees to recognize the benefit of the CRM implementation not only for the company, but also for their own career and personal development.

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THE CHANGE CURVE – OVERCOMING THE „VALLEY OF TEARS"

Spirit/Motivation

high

Change is communicated

low

Time

high

"Why should I change?"

2. Negation

wrong feeling of security, assessment of own competence is too high

"Let's make this a huge success!"

7. Integration

Adoption of successful behavior patterns into the active repertoire of actions

"I understand what this means for me"

3. Understanding

the necessity of new patterns of behavior and procedural approaches, insecurity

"I heard some changes are about to come"

6. Knowledge

why certain behavior patterns lead to success and others to failure

1. Shock

great difference between own and other people's high level expectations and actual reality

Valley of tears

5. Trying out

and searching new behavior: success - failure, anger - frustration

"This change is OK"

4. Acceptance

of reality, "discarding" old habits

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THE CHANGE CURVE – HOW TO MANAGE CHANGE

Spirit/Motivation

high

"Why should I change?"

2. Negation

Discuss

"I understand what this means for me"

3. Understanding

Reflect implications of change

"Let's make this a huge success!"

7. Integration

Finalize the transition process

"I heard some changes are about to come"

Change is communicated

1. Shock

Communicate goal-oriented

Valley of tears

"This change is OK"

4. Acceptance

Get moving towards behavioral changes

6. Knowledge

Give support to affected people

5. Trying out

Develop behavior towards target state

low

Time

high

Informing / communicating / mobilizing

Skills development

Coaching

Monitoring

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CHANGE MANAGEMENT - KEY SUCCESS FACTORS
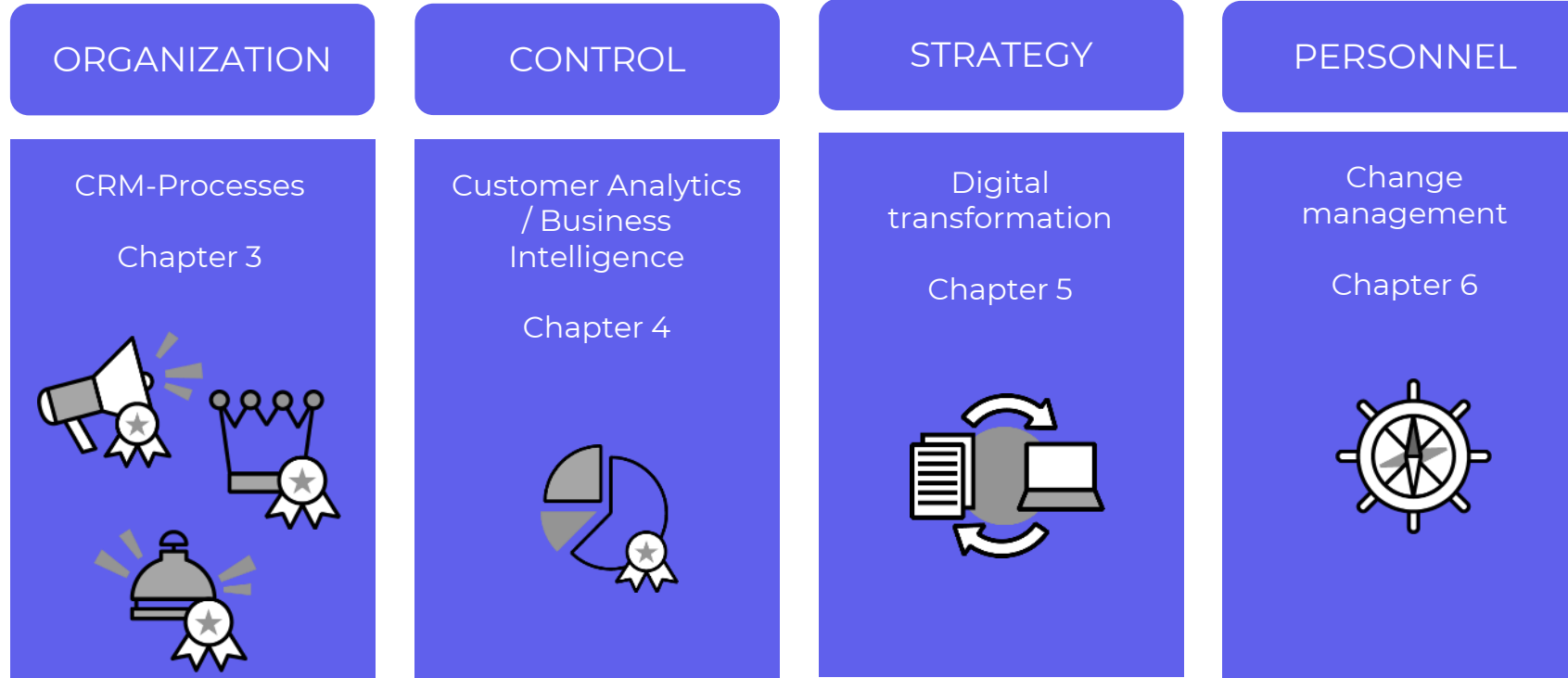
Key success factors

Experienced employees must be involved.

All those involved must be **motivated** to realize, the project successfully.

Sufficient **communication and project management skills** must be available

Project teams must establish **personal proximity to project stakeholders**.

Extensive **experience** in **planning and controlling of the business** are necessary.

Management must be **actively** involved.

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HOLISTIC CRM / CJM

- Holistic CRM/CJM

OUR PORTFOLIO

AT A GLANCE.

OUR PORTFOLIO AT A GLANCE

TECHNOLOGY PARTNERS

MARKETS	DACHLI	US/UK	CEE

CRM & Workplace

Data & AI

Cyber Security

Cloud & Managed Services

Technology Services

- TELCO & UTILITIES
- FINANCIAL SERVICES & INSURANCE
- HEALTHCARE, LIFE SCIENCE, LOGISTICS& TRANSPORT
- SOFTWARE & TECHNOLOGY
- AUTOMOTIVE, MANUFACTURING & CONSTRUCTION
- PUBLIC SECTOR
- RETAIL, CONSUMER GOODS, FASHION & LUXURY

NEARSHORE **ONSITE**

DELIVERY MODELS Managed Services Technology Services Project Services Products/Solutions

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CRM & WORKPLACE

#1 IMPLEMENTATION PARTNER FOR THE DIGITALIZATION OF YOUR SALES/ MARKETING/SERVICES PROCESSES & ORGANIZATION

CRM & CUSTOMER JOURNEY

AI-driven personalized Customer Journeys for Marketing, Sales & Services.

- Industry-specific solutions for sales, marketing, commerce & service
- Customer journey management based on leading CRM solutions
- AI-driven personalized customer journeys

WORKPLACE

Employee efficiency and digital workplace & process automation for digital CX.

- Employee efficiency through digital workplace & process automation
- Full Managed Digital Workplaces
- Collaboration Solutions
- Portals & Communities
- Workplace Security

INTEGRATION & DATA

Integration and operation of Data, Systems & Processes to empower Digitalization.

- Unlock your data potential with data platforms
- Empower your customer journey with data & system integration
- Data migration & data cleansing

CLOUD & OPERATIONS

Cloud & Managed Services for Customer Journeys.

- Operations & Management for Customer Experience Cloud
- Office 365 Operations & Support
- CX DevOps

END-TO-END DIGITAL TRANSFORMATION PORTFOLIO FOR INDUSTRIES TO GROW A SUSTAINABLE BUSINESS

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QUESTIONS & ANSWERS.

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