Seven Questions Most CRM Vendors Are Afraid You'll Ask:

Success Secrets for Evaluating Customer Management Software

ONYX®

The “foreseeable future” is a contradiction of terms. Yet many companies select Customer Relationship Management (CRM) software based on its ability to meet their needs today and for the foreseeable future. “He who lives by the crystal ball soon learns to eat ground glass,” wrote the late economist Edgar Fiedler.[1]

There are two ways to evaluate CRM applications. The two approaches, and their results, are poles apart, but the intent is the same. The goal is to select a platform for improving the way you do business, driving profits and reducing risk, while minimizing IT resource requirements.

The feature-comparison approach is a direct route to paralysis by analysis. Meticulously researched feature checklists are a way to prepare for the present. Careful feature-by-feature examination of the leading CRM offerings may lead to the selection of a system that is quickly outgrown, possibly before you deploy it.

Onyx has drawn on our interactions with over 1,300 CRM customers to develop a *problem-solving* approach to the evaluation process. Analyzing applications for their problem-solving acumen is a way to prepare for the future. In this white paper we explain that process and provide a new kind of problem-focused checklist that examines seven areas that are common elements of successful customer management projects:

1. Single View of the Customer
2. Customer Process Improvement
3. Executive Value
4. Employee Value
5. Minimal IT Resource Requirements
6. Platform for Business Growth & Change
7. Risk Mitigation

To succeed in each of these areas requires a flexible, scalable CRM solution. It requires an industry-standard architecture that leverages your existing infrastructure and upgrades easily to keep your total cost of ownership low. Above all, the right solution will have a combination of CRM and Business Process Management (BPM) that fits your business processes today — and in the unforeseeable future.

In the following sections we describe seven success factors and their main components. Use the questions provided to evaluate solutions and choose the right one. For your convenience, the questions are summarized in the appendix.

[1] The Three Rs of Economic Forecasting--Irrational, Irrelevant and Irreverent by Edgar R. Fiedler, 1977.

Seven Key Success Factors

Single View of the Customer

The most frequently cited goal of CRM projects is to obtain a 360 degree view of all interactions with customers and prospects. Consolidating this customer information is no small task. You might initially implement CRM for your sales team or call center, where customer data is best organized. However, achieving maximum Return on Investment (ROI) depends on going farther, bringing other departments onto the system. You may need to do this in subsequent phases, especially when each department uses their own databases or filing systems.

1. Single View of the Customer	**Vendor 1**	**Vendor 2**	**Vendor 3**
Multi-Department – Can all customer-facing departments use the system, including marketing, sales, and customer service?			
Multi-Channel – Can the customer management system track multi-channel customer interactions, including telephone, web, email, mail, fax, and in-person meetings?			
Online/Offline – Can the customer management system support offline work, such as entering contact notes on a laptop and then synchronizing at the end of the day? Can it support wireless online work, such as quickly updating customer records via a PDA or smart phone?			
Internal/External – Can the customer management system manage all customer interactions, whether driven by customer-facing employees, self-service customers, prospects, or channel partners?			
Robust Integration – Can the customer management system easily integrate with other sources of customer data?			
Infrastructure – Will the system leverage our current investment in IT infrastructure and blend with our investments and strategies? Will it allow us to update the CRM system quickly and painlessly, by moving our modifications to the next version instead of forcing us to start over?			

To get a single view of the customer, your CRM system must be robust in several areas:

- **Multi-Department Use** – The CRM system must satisfy the requirements of marketing, sales, customer services and other customer-facing groups. In addition to making each group's job easier, the CRM system can provide a valuable cross-departmental view. Sales wants to know what marketing campaigns have touched their prospects, account management needs to keep tabs on a key client's technical support issues, and executives want a quick summary of all activity before they go into a client meeting. Strong CRM systems have the features that each department needs and the architecture for them to share information in the appropriate way.

- **Multi-Channel** – How do your customers want to communicate with you? Whatever the answer, your CRM system should make it easy to track that communication, whether it be a call or meeting note, alert on a Web site visit, or an email. Is it easy for your users to pick which e-mails in their inbox get tracked in the CRM system without needing to cut and paste? Is it easy to open the customer record when a call comes in? Multi-channel capabilities are important to get the single view of the customer and also to drive user adoption.

- **Online/Offline** – Wireless data communications are expanding to keep mobile workers connected to the applications they need to succeed. But with occasional issues of coverage, speed and hardware, wireless is not the answer for every field sales or service rep. Not being connected can become a barrier to adoption for mobile workers. Your CRM system should support offline work, such as entering contact notes on a laptop and then synchronizing at the end of the day. It should also support wireless online work, such as quickly updating customer records via a PDA or smart phone.

- **Internal/External** – Not all of your customer interactions are driven by internal resources. Some customers and prospects will visit your Web site looking for information, while others look to your channel partners. Your CRM system should support customer self-service and partner management for a single view of the customer.

- **Integration** – Your CRM system must have an architecture that enables robust integration to vital customer information stored in financial, ERP, and other existing systems. Some integrations may be read-only, while others may require a one-way or two-way data sync. For some uses, batch integration will suffice, while others require real-time integration. Make sure your CRM vendor can provide examples of each type of integration.

- **Infrastructure** – Leveraging your current investment in IT infrastructure is the fast lane toward ROI. It is one of the benefits of open standards and the robust integration capabilities they enable. Your CRM system must blend with your previous investments and strategies, not require a forklift IT upgrade. Software updates have a direct impact on total cost of ownership. Confirm that your chosen vendor will allow you to update the CRM system quickly and painlessly, by moving your modifications to the next version instead of forcing you to start over.

Customer Process Improvement

To stay ahead of competitors and increase ROI, companies are looking to improve their customer processes through automation. But customer-facing processes are challenging to automate and manage because they are always changing. Your CRM system should provide not only the platform for automating these critical customer processes, but also the means to analyze the effectiveness of your processes and easily modify them as your business changes.

2. Customer Process Improvement	**Vendor 1**	**Vendor 2**	**Vendor 3**
Process Platform – Does the customer management system enable us to automate, manage, analyze and evolve key customer processes (e.g., new client setup, customer service escalation, compliance)?			
Cross-Departmental – Can the customer management system automate and orchestrate processes that extend across departments and touch multiple systems?			
Single Interface – Can our customer-facing employees execute key business processes using a single, familiar interface?			
Complex Processes – Can the customer management system improve the efficiency of processes that involve a high volume of transactions and improve the execution of processes requiring complex rules or personalized handling?			
Ease of Change – Does the customer management system provide intuitive, graphical interfaces that business analysts can use to quickly create and modify process flows and business rules as our business changes?			
IT Independent – Does the system allow business analysts to modify processes, without waiting in line behind other IT priorities? Does it include analytical tools to see how well the processes are working?			

Many Onyx clients have focused on improving key customer processes and have experienced significant ROI. One of them, a mid-sized bank, confirmed the importance of managing customer processes. The bank originally believed that their customer management system had paid for itself simply by consolidating client information — however, most of their evidence was anecdotal.

Once the bank began automating key customer processes they realized significant, quantifiable benefits. Credit card applications were processed in 30 to 50 percent less time. Average approval time went from 24 hours to less than two hours.

How did automating these key customer processes affect their bottom line? They were soon enjoying a 61 percent increase in new applications, for a corresponding increase in new credit card sales of 47 percent.

The keys to successful customer process improvement include:

- **Process Platform** – To truly automate and manage key processes, you need more than a simple rules engine and rules wizard. A process platform provides the basis for modeling, automating and changing any combination of your key business activities, from the simplest to the most complex, then analyzing the effectiveness of those processes through dashboards and other online analytical tools.

- **Single Interface** – Customer processes often involve multiple back-office systems and departments. Learning to use multiple systems can be challenging for customers and customer-facing employees. Your customer management system should provide a single, easy-to-use interface that ties into the necessary underlying systems in a way that is transparent to the user.

- **Complex Processes** – Establishing new accounts, originating loans, and other high-volume business processes have disproportionate resource requirements and are often subject to excessive error and rework rates. That makes them a prime target for process automation, but ordinary workflow programs stumble on the complex business rules and fall flat where personalized handling is required. To manage complex or hands-on customer processes requires true, cross-functional, BPM capabilities. Such capabilities must have the scalability and flexibility to automate processes with high volumes of transactions, even if they are the most complicated processes in your business.

- **Cross-Departmental** – Many of your most important customer processes span multiple departments. A process platform enables you to shed the restrictions that department-specific systems and workflows may present. Cross-departmental process management improves visibility for everyone in your organization.

- **Ease of Change** – Your process management platform must be as agile as your business. Over time you may identify this as the single most important attribute of a customer management system. The value of automating and improving key customer processes will never be realized if you avoid automating processes that change frequently.

- **IT Independent** – Relying on the IT department for process changes will cause bottlenecks. Business analysts should be able to modify processes, without waiting in line behind other IT priorities. Ensure that your customer management system provides graphical tools that enable business analysts to fine-tune processes themselves rather than shifting workload onto the IT department. It should also provide analytical tools to see how well the processes are working, to inform the next set of changes.

Executive Value

Executive buy-in is strongest when executives see the customer management system as a critical tool for managing the business. They look first at the justification for customer management as a *business methodology* for problem-solving. Developing a strong business case elevates the critical problems and solutions to the executive level. Secondly, executives look at customer management as an *information technology* that will help them monitor and control key business metrics through comprehensive reporting. This combination of problem-solving and reporting are what create business value — and support — at the executive level.

3. Executive Value	Vendor 1	Vendor 2	Vendor 3
Business Case – Is there a clear quantifiable business case to justify the investment in customer management technology?			
Key Reports – Can the customer management system provide key reports our executives use to run the business?			
Analytics – Can executives drill down from high-level reports to analyze additional detail from the customer management system?			
Comprehensive Insight – Can the customer management reports include data from our other systems (e.g., finance/accounting, ERP, HR)?			
Don't Change the Way I Work – Does the system provide an executive dashboard and e-mail alert functionality for executives who prefer not to access the system regularly?			

This combination of problem-solving and reporting are what create value and support at the executive level. Once the business case is established, focus on what reports need to come out of the system, not just how to make it easy to enter information into the system.

- **Key Reports** – When executives use reports from the customer management system in weekly management team meetings, the value of the system is evident throughout the organization. Customer management systems hold a wealth of data that executives use to run the business, including sales pipeline, at-risk customers, and marketing campaign effectiveness reports.

- **Analytics** – Some executives are comfortable having only high-level information; others want to analyze the supporting data. Robust customer management systems enable executives to drill down from a summary level report. Analytics allow them to dive deeper by slicing and dicing the data with easy-to-use tools, or by zooming in to call notes, sales opportunity information, or marketing campaign milestones.

- **Comprehensive Insight** – Executives will not use reports that lack critical information. Customer management reports often need to draw on information from multiple systems, including accounting, ERP and back-office transactional systems. It is important that your customer management system integrates with these systems and can report on data from multiple systems.

- **Don't Change the Way I Work** – To ensure executive buy-in, it is important that the customer management system add value without giving them another complex interface to learn. Most executives want to see summary level information at a glance, often in a dashboard format. Alerts via email also fit well into the way executives work. While some executives may become power users of your customer management system, others will want the system to present a limited amount of information within applications they are already using.

Employee Value

A customer management system will not help you run your business more effectively if people do not use it. Employees adopt a customer management system most readily when they see that the system is easy to use, helps them to succeed at their jobs, and has executive buy-in.

4. Employee Value	Vendor 1	Vendor 2	Vendor 3
Simple Interface – Does the system have a clean, easy-to-use interface?			
Personalization – Can individual users personalize the system to work how they want to work?			
Streamlined Data Entry – Can commonly performed actions be easily automated?			
External Data – Can the customer management system user interface seamlessly present data from other applications or content sources?			
Instant Reports – Can users access key reports from within the customer management system without having to switch to an entirely different application?			
Anywhere Access – Can users access key customer management data via email, PDAs, remote laptop, and other preferred means? Can they update it online or offline?			
Support – Do users have access to timely, effective training materials and support resources?			
What's In It For Me? – Can users see examples of how the system makes their job easier on a daily basis?			

The majority of the line items in the table above can be classified as ease of use factors, but the "what's in it for me?" question should be given equal consideration. A brief description of these factors follows:

- **Simple Interface** – Users shy away from learning complex interfaces that require too many steps to complete a task. Ease of use is the key to rapid adoption. Your customer management system should have a straightforward set of screens that present information in a clear, concise way.

- **Personalization** – Assuming your customer management system is being used across multiple departments, it is important that sales, marketing, customer service and other users see an application tailored to their specific needs. Within departments, individuals will have their own preferences as well, and your customer management system should support both group and individual personalization.

- **Streamlined Data Entry** – No one likes to enter data. The customer management system should be able to provide automated shortcuts for commonly performed actions (e.g., enter a note, create a contact, track an e-mail), minimizing the clicks, screens, time and training required. This capability ties into personalization, maximizing the user's comfort with the system.

- **External Data** – For many users, the customer management system will not hold all of the data they need to do their jobs. Your customer management system should be flexible enough to present data from other systems, without toggling between multiple applications. Some external data, including Web-based resources, should be easily presented in the standard screens provided by your CRM system. Other, more complex data may require custom screens, and your system must allow for the easy creation of those screens as well.

- **Instant Reports** – A robust set of reports helps to speed adoption of the customer management system. Reports aren't just important for executives; users at all levels need information critical to their jobs, in a format that makes sense to them. Key reports should be accessible as an integral part of commonly used screens, with one click for stand-alone reports, or within a personalized dashboard.

- **Anywhere Access** – For salespeople and other mobile workers, remote access to the customer management system is very important. That doesn't always mean using wireless hot spots. Do your road warriors prefer synchronizing a laptop, always being online with a BlackBerry, or some combination of these? Regardless, your customer management system should allow each mobile user to access and interact with the system the way they prefer, from wherever they are.

- **Support** – End users should have access to a variety of initial and ongoing training materials and resources, in the classroom or on the job. In an effort to minimize costs, customer management projects sometimes skimp on training. This can present a significant obstacle to user adoption. Initial training establishes a core group of power users who can help guide other users. The vendor should have a strong support organization to answer questions that internal experts cannot.

- **"What's In It For Me?"** – Throughout the design, implementation and ongoing support of your customer management system, is well worth the time to identify how the system will make users more effective at their jobs. The system should save time, improve productivity and increase operational visibility. Find ways of reminding users that the system is delivering these benefits. For example, collect user testimonials and regularly disseminate them to the user community.

Minimal IT Resource Requirements

Businesses rely on their IT staff to support key business capabilities. As a result, IT resources are in high demand – and a lack of available IT resources can cause a bottleneck for key business initiatives. The following table lists several aspects of a customer management system that affect the level of IT resources that will be required to maintain and support the system and continually adapt it to changing business needs.

5. Minimal IT Resource Requirements	**Vendor 1**	**Vendor 2**	**Vendor 3**
Industry Standards – Does the customer management system leverage XML and other industry standard technologies so that our IT personnel will not have to learn proprietary tools?			
Web Services – Is the system Web services enabled, allowing other applications to use the Internet-standard protocols such as XML and SOAP to access the entire set of customer management capabilities?			
Ease of Change – Can modifications to oft-changing reports and business processes be made by business analysts, without requiring IT staff to write code?			
Ease of Upgrades – Does the system allow us to update the CRM system quickly and painlessly, by moving our modifications to the next version instead of forcing us to start over?			
Multi-Tenancy – Can we run multiple instances of the customer management software to support different business units with different customer attributes, user views and business rules on a single set of hardware?			
Support – Do IT staff have access to timely, effective training materials and support resources?			

Companies who consider their customer management projects to be a success cite the following criteria as keys to minimizing IT resource requirements:

- **Industry Standards** – Applications that require your IT staff to learn proprietary programming languages and tools greatly increase costs. Your customer management system should leverage de facto standards. Many enterprise software systems support such standards as eXtensible Markup Language (XML), Service Oriented Architecture (SOA), or Web Services. Others offer an Application Program Interface (API) or support Open Database Connectivity (ODBC) calls. In addition to using open standards for exchanging data with other systems, your application should also use them internally to avoid performance-degrading translation layers.

- **Web Services** – Web services provide a flexible way of linking software applications, allowing them to share information without being directly integrated. Any application can be integrated with any other application so long as the two are Web services enabled. This approach is less demanding than rigid product integrations that require the IT staff to learn how to interact with the APIs in each application.

- **Ease of Change** – Business rules and process logic are continually refined to improve effectiveness. A key success factor for your customer management system is the ease with which it can be changed to support evolving business requirements. Look for systems that allow you to make significant process changes quickly without writing code, and tools that allow business users to make those changes without requiring IT staff. These capabilities greatly reduce the support burden on your IT staff and ensure that your customer management system stays current in support of your changing business.

- **Ease of Upgrades** – For software updates, confirm that your chosen vendor will allow you to update the CRM system quickly and painlessly, by moving your modifications to the next version instead of forcing you to start over.

- **Multi-Tenancy** – Multi-tenancy allows you to meet the needs of specific departments for business units without having to actually physically deploy and manage multiple systems. One of the drivers behind multi-tenancy is the difficulty most organizations have in answering what seems like a simple question: "What is a customer?" The fact is you need to model a consistent, corporate-wide view of a customer in a way that allows different business units to model and work with unique customer attributes and business processes. In doing that, it's inevitable you will end up with different sets of customer attributes, business rules and user views into the customer data. When you have a solution that supports multi-tenancy you don't need separate systems or hardware to run separate configurations of your CRM software.

- **Support** – Does your customer management vendor have a good reputation for supporting customers? Check references to ensure that your IT staff will not spend valuable time solving problems on their own or waiting for answers from an unresponsive vendor.

Platform for Business Growth and Change

To succeed, your business must grow and change. For your customer management project to be a success, the system must be able to grow and change with your business. A typical feature-driven evaluation of vendors often overlooks this capability. It is a natural tendency to favor a solution that has features needed by a single group whose needs are most immediate – although these needs must certainly be met, it is important to keep sight of the system's ability to meet future needs as well, maximizing overall business improvement opportunities.

6. Platform for Business Growth and Change	Vendor 1	Vendor 2	Vendor 3
Expansion – Many companies start out deploying customer management to a single sales team or call center group – can your system expand to meet the needs of additional departments and groups in the future?			
Flexibility – Is it easy to modify the system to reflect ongoing changes in our business without requiring IT developers to rewrite code?			
Scalability – Can the system support thousands of users with sub-second response times?			
Integration – Can the customer management system integrate easily with our legacy systems and other enterprise applications?			
Global – Does the system support multiple time zones, currencies and languages?			

Although evaluating a system's capabilities to serve as a platform is more difficult than comparing feature checklists, there are several key areas that should be considered:

- **Expansion** – Deploying your customer management system across multiple departments helps to obtain a single view of all customer interactions. However, many companies start by deploying to a single department, then rolling out the system to other groups over time. This approach works well as long as the customer management system is able to expand to meet the needs of those additional groups. Inexpensive applications may meet the immediate needs of the sales force, but don't have the functionality necessary to provide value to customer service, marketing and other departments or divisions. It is not enough for the vendor to say they have the features and architecture to expand to meet your enterprise needs – drill down to determine how many customers are using the vendor's system in more than one department or group.

- **Flexibility** – Regardless of how expansive your customer management rollout is, the system needs to be flexible to change as your business changes. Too often, companies find that a rigid application that was designed to meet their needs of a year or two ago delivers less value and suffers from declining end-user adoption as business needs evolve. Look for systems that have strong workflow administration tools, allow business analysts to make changes themselves, and preserve your modifications during upgrades.

- **Scalability** – As you look to deploy a customer management system across your company, you must be confident that it can support your staff with no degradation in performance. Ask your vendor for scalability benchmark test results and large enterprise references.

- **Integration** – Is your customer management system built to integrate to a wide variety of other systems? Like most companies you may look to tie your customer management system into other systems (e.g., ERP, accounting, e-commerce, or mainframe transactional systems) to maximize business value. Beware of CRM systems lacking a track record of robust integrations, or those known for long, costly integration projects.

- **Global** – As more companies do business globally, the implementation of customer management systems across multiple countries has increased. It is important to make sure your customer management system has been internationalized and that it supports core technologies such as Unicode. With Unicode support, a company needs just one central database that supports the major languages of the world. Offices or branches in other locations will be able to input, search, access and manipulate customer data in their own native language simply by using the local language interface.

Risk Mitigation

Stories of failed CRM and other enterprise software projects are common. However, companies know that they need an effective customer management system to help them compete in today's business environment. As a result, companies look for ways to minimize the risk associated with deploying enterprise software applications. Many aspects of risk, such as user adoption and executive buy-in, were discussed in previous sections. In this section, we address several areas that, if addressed satisfactorily by the vendor, will boost your confidence in the outcome of your customer management initiative.

7. Risk Mitigation	Vendor 1	Vendor 2	Vendor 3
Accessible References – Can the vendor provide reference customers that we can talk to?			
Proven Methodology – Is the vendor known for setting realistic expectations of what is required to be successful? Is there a strong ecosystem of third-party and vendor consultants with deep product knowledge and a library of best practices gathered from many years of successful deployments?			
Security – Does the customer management system make it easy to restrict access to certain information?			
Total Cost of Ownership – Does the vendor have a track record for low ongoing maintenance, integration, upgrade and administrative costs?			
Future Vision – Does the vendor have a technology vision that will continue to provide our business with a source of competitive advantage?			

- **Accessible References** – Many software companies have an impressive customer list, but will they let you talk to any of them? Can you speak to multiple people at the reference customer, or just one designated spokesperson? Will the customer host a site visit or online demo of their system? Companies that have been successful with their CRM projects took the time to talk in detail with multiple references from each vendor they were seriously considering.

- **Proven Methodology** – It is imperative that the vendor has a track record of delivering successful customer management projects. Setting expectations correctly up front is a very important first step in successfully implementing enterprise software. Is the vendor willing to take a phased approach, building momentum within your organization with each successful milestone? Ensure that your chosen vendor has experienced direct and indirect consulting resources, a proven implementation methodology, and a strong support infrastructure for system integration partners.

- **Security** – A robust security model is necessary to ensure that critical customer information is accessible only to the appropriate people within your organization. Given the recent focus on compliance processes, make sure your customer management vendor has the ability to implement role-based security and produce audit trails of system usage.

- **Total Cost of Ownership** – Many companies make the mistake of assessing only the up-front costs of buying and deploying an enterprise software application. However, customer management systems that are difficult to integrate, difficult to change without significant IT resources, or difficult to upgrade are perfect examples of the "Tip of the Iceberg" phenomenon. Ensure that your vendor accurately accounts for maintenance and other ongoing costs so that what looks attractive on the surface doesn't come with much larger costs lurking below the surface.

- **Future Vision** – Ideally, your customer management vendor becomes your partner in an effort to find ways to continually improve the way you do business. Find a vendor who has a strong vision of how their technology will evolve in the future and the benefits that will accrue to you over time as you leverage their advancements.

Summary

Making the right choice of CRM application involves looking at its ability to solve the business challenges you expect, as well as the ones you do not expect. The checklist in this paper reflects this problem-solving approach to the CRM evaluation process.

CRM is a business tool that improves customer processes, reduces risk, makes employees more productive and provides a platform for business growth and change. It is also an information technology that provides a single view of the customer and delivers insight for executive decision-making. Ideally, CRM delivers all of these benefits without tying up more IT resources than necessary.

You will not find these attributes by using a feature-oriented approach to the CRM evaluation process. You will find them by contacting Onyx.

Exhibit

Consolidated Checklist for Customer Management Success

1. Single View of the Customer	Vendor 1	Vendor 2	Vendor 3
Multi-Department – Can all customer-facing departments use the system, including marketing, sales, and customer service?			
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3. Executive Value	Vendor 1	Vendor 2	Vendor 3
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Security – Does the customer management system make it easy to restrict access to certain information?			
Total Cost of Ownership – Does the vendor have a track record for low ongoing maintenance, integration, upgrade and administrative costs?			
Future Vision – Does the vendor have a technology vision that will continue to provide our business with a source of competitive advantage?			

Onyx Software Corporation (NASDAQ: ONXS) is a worldwide leader in customer process software and solutions for the enterprise. Onyx provides flexible solutions that enable organizations to automate, manage, and evolve their customer processes quickly and cost-effectively for strategic advantage. Onyx serves more than 1300 customers in a variety of industries including financial services, health care, contact center, high tech and local government.

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