

**IMPLEMENTING CRM FOR RESULT
TRACKING OF A CANDIDATE
WITH INTERNAL MARKS**



PROJECT NAME

**Implementing CRM for result tracking of a
Candidate with internal marks**



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Introduction

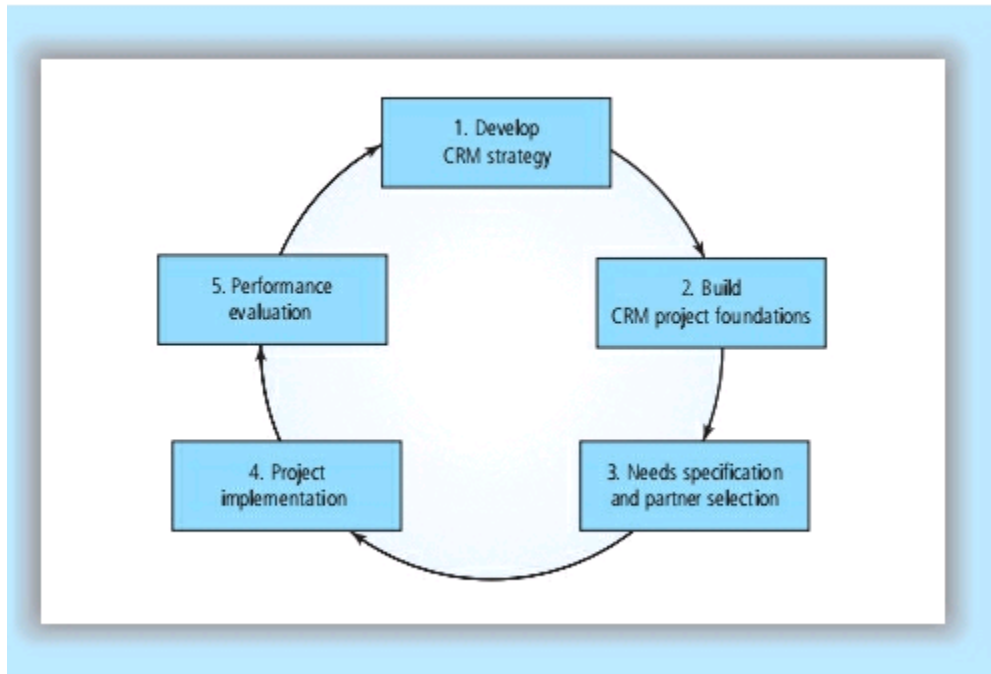
In the first chapter you were introduced to strategic, operational, analytical and collaborative CRM. You also learned that although CRM projects generally involve technology implementations, people and processes can also play a large part. Indeed, we said that IT cannot compensate for bad processes and inept people. Most CRM projects involve consideration of all three components.

You may have sensed from this discussion that CRM projects can vary considerably in their scope. An organization-wide CRM project that automates selling, marketing and service processes might involve process reengineering, people re-skilling and implementation of a comprehensive range of technology applications from a CRM suite vendor like SAP. The project might span several years and cost many millions of dollars. A small CRM project might involve rolling out an off-the-shelf contact management system such as Gold Mine or SAGE to a sales team. This might take a couple of months to implement and cost less than a thousand dollars to complete.

CRM implementation

In this chapter we'll look at the five major phases of a CRM implementation, and the processes and tools that can be used within those phases to ensure that CRM projects deliver what is expected of them. 1 Depending on the scope of the project some of these phases, processes and tools may not be required. The key phases, as shown in Figure 3.1 are:

1. Develop the CRM strategy
2. Build the CRM project foundations
3. Specify needs and select partner
4. Implement the project
5. Evaluate performance



Embedded within each of these five key phases are a number of decision-points and activities, as follows:

1. Develop the CRM strategy:

- Situation analysis
- commence CRM education
- develop the CRM vision
- set priorities
- establish goals and objectives
- identify people, process and technology requirement
- develop the business case

2. Build the CRM project foundations

- identify stakeholders
- establish governance structures
- identify change management needs
- identify project management needs
- identify critical success factors
- develop risk management plan.

3. Specify needs and select partner

- Process mapping and refinement
- Data review and gap analysis
- Initial technology needs specification, and research alternative solutions
- write request for proposals (RFP)
- Call for proposals

4. Implement project:

- refine project plan
- identify technology customization needs
- Prototype, test, modify and roll out.

5. Evaluate performance

- Project comes
- business outcomes.

Build CRM project foundations

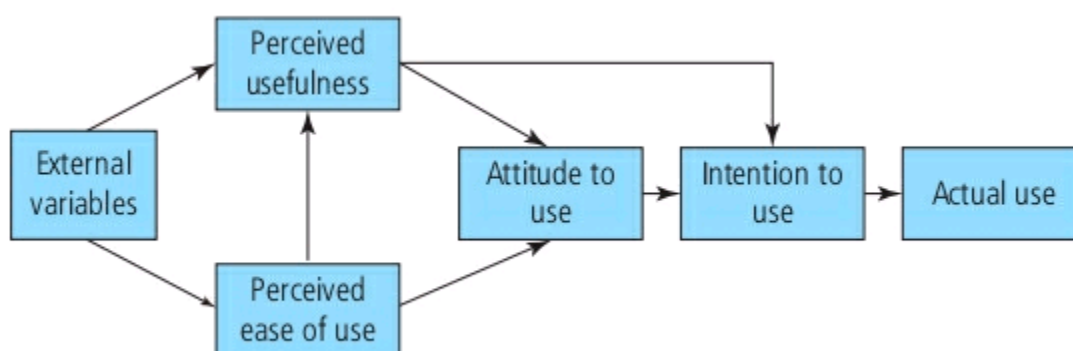
Having created the CRM strategy the next phase involves building the foundations for the CRM implementation.

Identify stakeholders

The first step is to identify stakeholders. Stakeholders include any party that will be impacted by the

change – this could include senior management, users of any new system, marketing staff, salespeople, customer service

System users are important stakeholders. The importance of involving system users in the implementation of new technologies is reinforced by research conducted by Fred Davis and others. Davis found that intention to use a new technology is predicted by the perceived ease-of use of the technology and the perceived usefulness of the technology. This is expressed in the Technology Acceptance Model which has been subjected to considerable testing and validation since Davis's initial work early engagement of user stakeholders can help ensure that the technology is perceived as both easy-to-e and useful by users.

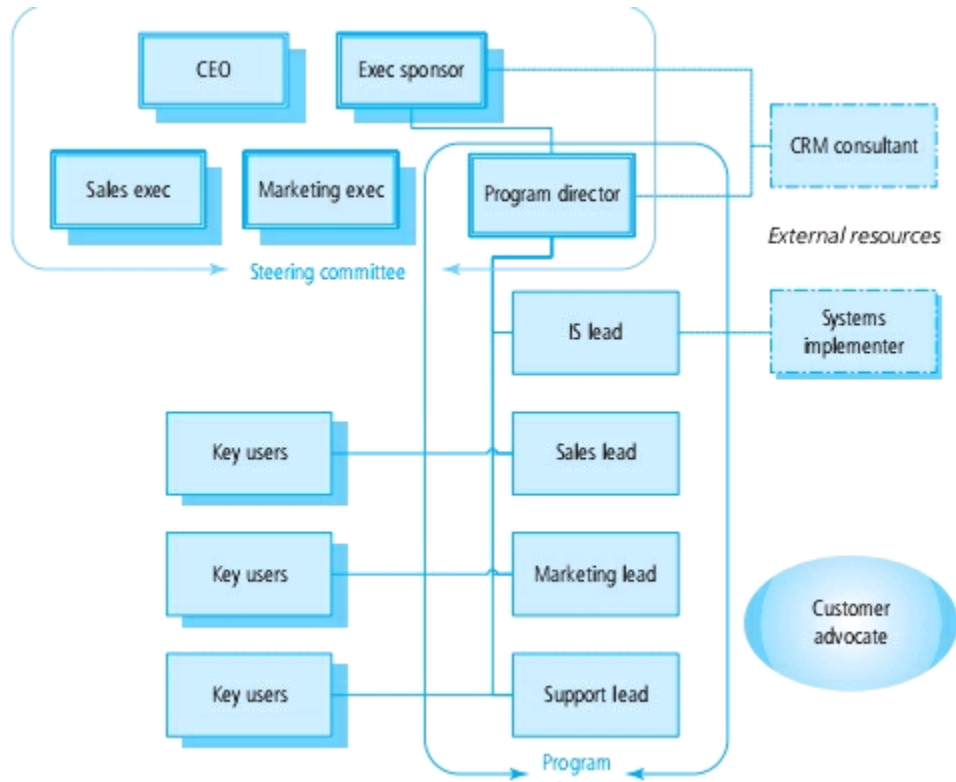


Establish governance structures

CRM projects are designed and implemented by people. Governance structures (see Figure 3.6) need to be put in place to ensure that project roles and responsibilities are properly defined and allocated.

The Program director (PD) plays an important role in this structure. Ultimately, the PD has responsibility for ensuring that the project deliverables are achieved and that project costs are controlled. In larger projects the PD will be a full-time appointment. The PD has a boundary spanning role – one foot is in the CRM steering committee, the other is in the program team. Another key member of the steering committee is the executive sponsor. This is typically a board level senior executive who commits real time to the project and ensures that resources are made available. The steering committee makes policy decisions about the CRM implementation – for example, which technology to buy, which consultants to hire – and ensures that the implementation stays on track and within budget. Other senior executives may sit on the steering committee to ensure that the project remains business-focused and does not slide into becoming an IT-dominated project. The program team is composed of representatives from the major stakeholders (shown in Figure 3.7 as 'Lead' roles). They have the responsibility of implementing the project successfully. The Leads may have their own advisory groups that ensure that stakeholder needs and concerns are known and brought to the program team. More importantly, the Leads are

responsible for ensuring that the right people are brought in for project activities. For example, if the selling process is be



CRM Implementations can impose considerable demands on your company's own internal IT resources which might be called on to perform several project-related roles. The lead developer role ensures that the CRM software is customized to meet the needs of users. The database developer role ensures that customer-related data held in disparate databases is made available to end-users in the form required for operational and analytical CRM applications. The front-end developer role ensures that the user interface is easy to understand and use. It is not uncommon for CRM projects to import resources and talents to help deliver the project. This governance structure will have a CRM consultant working with the steering committee. It is unlikely that an in house steering committee will have sufficient experience of CRM project implementation. An experienced consultant can help the steering committee overcome problems as the project progresses. A systems implementer is also shown in this governance structure as an important external resource. For an installed CRM system, vendors generally supply technical help to ensure that the system is properly implemented. The implementer has a boundary-spanning role, being an employee of the vendor but working onsite as the client's advocate.

A systems integrator may also be needed to align disparate systems into a coherent whole to support the project objectives. Systems integration can be defined as follows:

Systems integration is the practice of aligning and combining system components such as people, processes, technology and data for the achievement of defined outcomes.

Very often desired CRM outcomes are impeded by the poor interoperability of IT systems. For example, the IT system that supports web operations may be incompatible with the IT system that supports the call centre. The result is that there may be two different databases containing important customer-related information. A systems integrator might be needed to program the interface that links the two systems.

Finally, the governance chart shows that the voice of the customer has to be heard in the project team. Customers of companies that implement CRM are important stakeholders, because their experience of doing business will change. Some CRM projects fail to deliver optimal outcomes because the project team fails

Identify change management needs

Even small CRM projects can prove challenging in terms of change management. A sales-force automation project might involve centralizing data that is presently kept on individual representatives' computers and making that information available to everyone in the team. Representatives will need to learn to share. In a distributed sales-force, these representatives may not have even met each other. If they also have to change their selling methodology, record keeping and reporting habits, there might be some worries, if not outright resistance.

According to consultants Booz Allen & Hamilton

Leadership teams that fail to plan for the human side of change often find themselves

wondering why their best-laid plans go awry ' .¹⁰ They describe change both in terms of top-down leadership and bottom

1. Create a sense of urgency so people begin to feel
2. Put together a guiding team to drive the change effort
3. Communicate for buy-in
4. Empower action by removing organizational barriers to change
5. Produce short-term wins to diffuse cynicism, pessimism and skepticism
6. Don't let up, but keep driving change and promoting the vision

John emphasizes that successful change management program adopt a see-feel-change approach. To bring about change it is necessary not only to get people to see the need for change, but also to feel so emotionally engaged that they want to change. He stresses the importance of emotional engagement with the program vision and strategies

Organizational culture

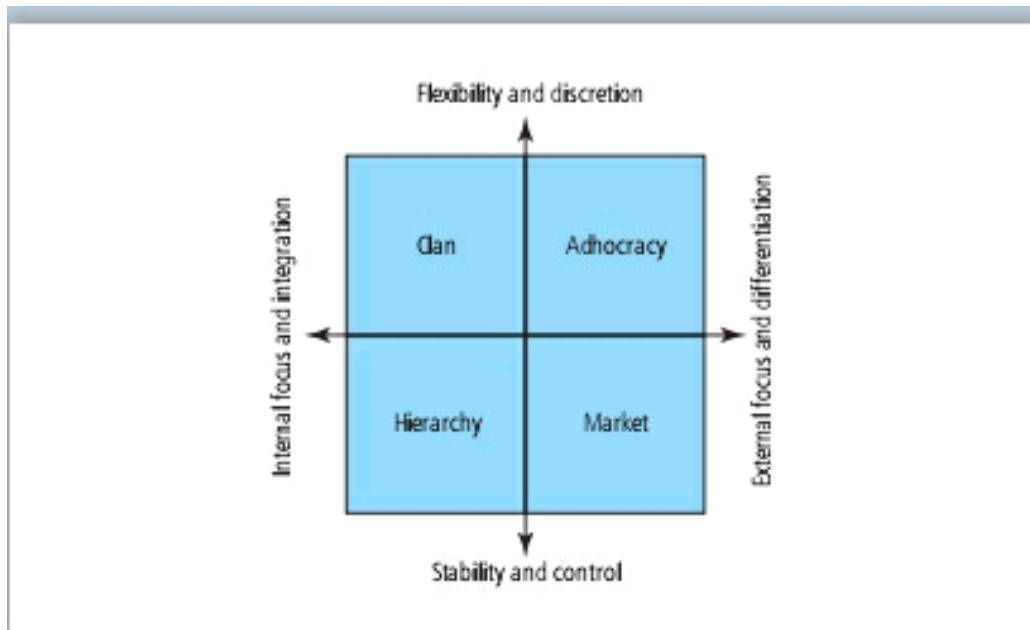
The idea of organizational culture has been around for many years. In everyday language, organizational culture is what is being described more formally, organizational culture can be defined as:

A pattern of shared values and beliefs that help individuals understand organizational functioning and thus provide them with the norms for behavior in the organization. ¹²

Essentially, organizational culture is understood to comprise widely shared and strongly held values. These values are reflected in patterns of individual and interpersonal behavior, including the behavior of the business leaders, and expressed in the norms, symbols, rituals and formal systems of the organization

A number of studies indicate that organizational culture affects business performance recent research has also shown that organizational culture is a predictor of CRM success. ¹⁴ Adhocracy, one of four organizational cultures identified in the Competing Values model shows the strongest association with CRM success. Adhocracies are highly flexible, entrepreneurial, externally-oriented organizations. Their core values are creativity and risk-taking.

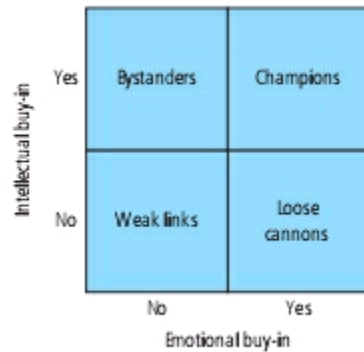
Cameron and Quinn have developed a process for companies wishing to change their culture, as indicated by the Competing Values model. ¹⁵ They suggest that cultural change may involve adjustment to the organization's structure, symbols, systems, staff, strategy, style of leaders and skills of managers, but emphasize that individual behavior change is the key to culture change.



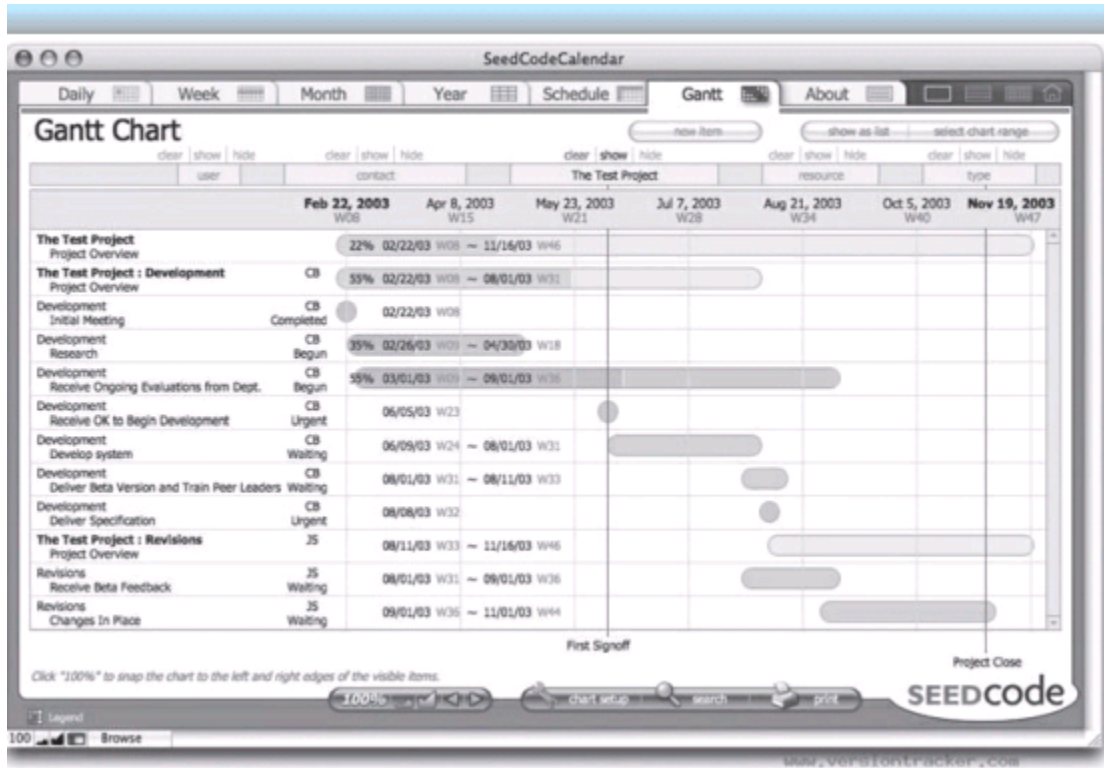
Buy-in

As noted by John, buy-in operates at an emotional or intellectual (rational) level. Intellectual buy-in is where people know what has to be changed and understand the justification for the change. New technologies are adopted more quickly when users believe that the system will be easy to use. Emotional buy-in is where there is genuine heartfelt enthusiasm, even excitement, about the change. The matrix in Figure 3.9 shows the possibility of four employee segments, reflecting the presence or absence of emotional and rational buy-in. Champions are emotionally and rationally committed. Weak links are neither emotionally nor rationally committed. Bystanders understand the changes being introduced, but feel no emotional buy-in to the change. Loose cannons are fired up with enthusiasm, but really don't understand what they have to do to contribute to the change. All these segments will be found in major changes projects such as a CRM implementation

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The CRM project needs to be marketed to each of these groups in different ways. The program challenges are to stir-up bystanders to become passionate about the project's goals, and to educate loose cannons on the reasoning behind CRM. Weak links can be truly problematic if they are in customer-facing roles or impact on customer experience. It has been said that it takes many years to win a customers' confidence and trust, but only one incident to break it. If efforts to win them over fail, weak links may need to be reassigned to jobs where there is no customer impact. Identify project management needs CRM implementations can place considerable demands on project management skills. A CRM project plan spells out the steps that will get you from where you are now (customer strategy situation analysis) to where you want to be (CRM vision, goals and objectives), on time and within budget. The CRM program director generally performs the project management role, but sometimes it is outsourced to a consultant. A project plan sets out the tasks to be performed, the order in which they are to be executed, the time each will take, the resources required to perform the tasks (including people and money) and the deliverables from each task. Tools such as Gantt chart critical path analysis (CPA), program



Network diagrams are useful tools for project managers. Some tasks will be performed in parallel, some in sequence. As the project rolls forward there will be periodic views to ensure that it is on time and on budget. A CRM project that has the goal of improving the productivity of marketing campaigns might be made up of a number of tasks or mini-projects, each with its own deliverable, including the following: market segmentation project, database development project, creation of a new campaign management process, management reports project, technology search and selection project, and a staff training project.

Identify critical success factors

Critical success factors (CSFs) are the 'must haves' underpin project success. Critical success factors can be defined as follows:

CSFs are attributes and variables that can significantly impact business outcomes. CRM consultants and vendors offer a range of opinions on CSFs, mentioning the following: a clear customer strategy that defines your company's offers, markets and channels; an organizational culture that promotes coordination and information-sharing across business units; an agreed definition of what counts as CRM success; executive sponsorship of the CRM program objectives; availability and use of pertinent,

accurate, timely and useable customer-related information; a clear focus on people and process issues, not only technology

There have been very few independent studies of CRM CSFs. Luis Mendoza and his colleagues conducted a qualitative study of CSFs that involved a panel of eight expert judges identifying 13 CSFs and 55 associated metrics covering people, process and technology aspects of CRM strategy. 18 The CSFs and their alignment with people, process and technology appear in Table the most important being highlighted in bold.

Silva conducted a single CRM case study test of three CSF models that had originally been developed in the context of enterprise resource planning (ERP) implementations. They found that CRM CSFs could be categorized as strategic and tactical. Strategic CSFs are encountered at the beginning of the project, while tactical CSFs become important later. Strategic CSFs include a clear CRM philosophy (we prefer the term), top management commitment and project management expertise. Tactical CSFs include trouble shooting skills, good communications and software configuration.

Li conducted an empirical assessment of CRM CSFs in 57 large Canadian organizations. 20 Focusing only on the technology element – therefore ignoring people and process issues – they collected data about CRM's impacts on customer satisfaction, retention, loyalty

Critical success factor	People	Process	Technology
1. Senior management commitment	X		
2. Creation of a multidisciplinary team	X	X	
3. Objectives definition	X		
4. Interdepartmental integration	X	X	
5. Communication of the CRM strategy to staff	X	X	
6. Staff commitment	X		
7. Customer information management			X
8. Customer service		X	X
9. Sales automation		X	X
10. Marketing automation		X	X
11. Support for operational management	X	X	X
12. Customer contact management	X		X
13. Information systems integration			X

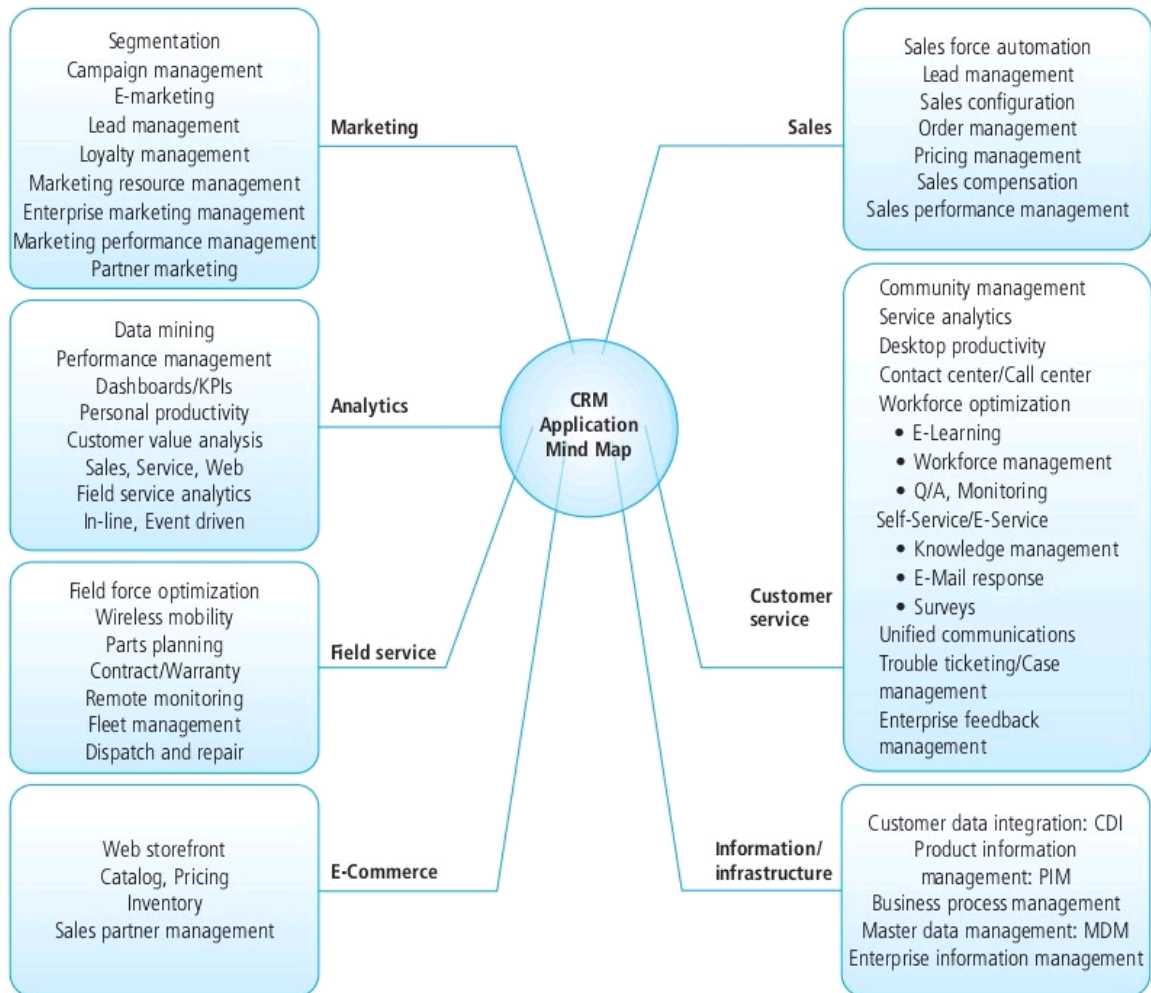
(Note: more important CSFs are bold typeface)

market share and looked for associations with a number of predefined critical success factors. They conclude that the CSF most strongly associated with CRM success is an accurate and well-developed knowledge management system. This has to be supported by a suitable IT infrastructure which can capture, manage and deliver real time customer, product and service information in order to improve customer response and decision-making at all customer touch points. They also found that another important CSF is top management support.

Develop a risk management plan

It has been claimed that a large number of CRM projects, perhaps as many as two-thirds, fail. ²¹ Of course, there can be many potential causes of failure, ranging from inadequate project management to resistance of end-users to the adoption of new technologies. At this stage, you'll be trying to identify the major risks to achieving the desired outcomes. Once identified, you can begin to put risk mitigation strategies and contingency plans in place. As you'd expect, some risks reflect an absence of the CSFs above. Gartner names a number of common causes of CRM failure: management that has little customer understanding or involvement; rewards and incentives that are tied to old, non-customer objectives; organizational culture that is not customer-focused; limited or no input from the customers; thinking that technology is the solution; lack of specifically designed, mutually reinforcing processes; poor-quality customer data and information; little coordination between departmental initiatives and projects; creation of the CRM team happening last, and the team lacks business staff; no measures or monitoring of benefits and lack of testing.

Risk mitigation strategies are your responses to these risks. Let's take the risk of management having little or no customer understanding. How might you respond to this? There are a number of things you could do – management could work in the front-line serving customers (McDonalds' executives do this), listen in to call centre interactions for at least one hour a week or mystery shop your own and competitor organizations.



Project implementation

By now, you have developed the CRM strategy, built the CRM project foundations, specified your needs and selected one or more partners. It is now implementation time!

Refine project plan

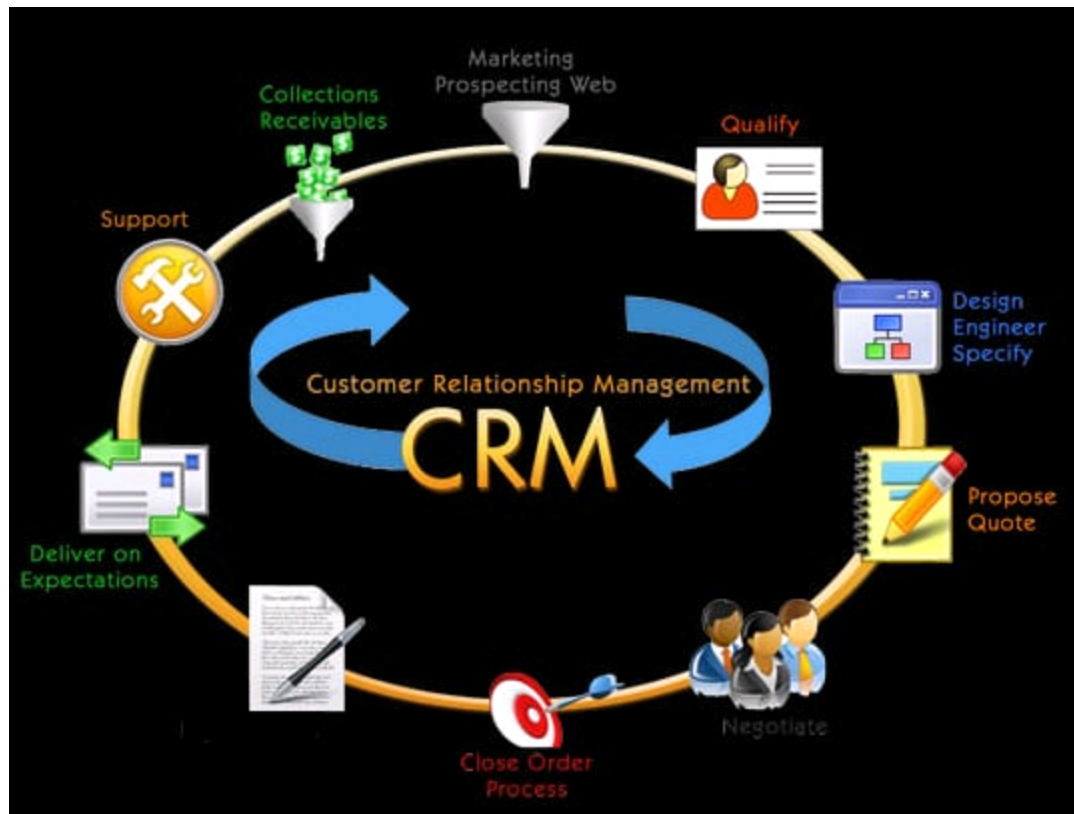
The first step of Phase 4 requires you to cooperate with your selected partners in refine the project plan. Remember, this was originally defined without consideration of the needs and availability of your partners. You may find that your partner's consultants are already committed to other projects and that you'll have to wait. Your partners will be able to help you set new milestones and refine the budget.

Identify technology customization needs It is very common that off-the-shelf technology fails to meet all the requirements of users. Some vendors have industry-specific versions of their CRM software. Oracle, for example, offers a range of CRM suites for banking, retail, public sector and other verticals. Even so, some customization is often required. The lead developer, database developer and front-end developer, in partnership with vendors, can perform these roles. Customization needs are typically specified using a gap analysis approach. The required business process is supplied to the vendor, who (after some preparation) presents how this process is supported in the software. Any gaps are highlighted for subsequent analysis and action. This continues until all business processes have been examined. The resultant gap register is then assessed, priorities are established and customization of their software and/or modification of the business process

Customization raises problems of ownership of Intellectual Property that both vendors and clients will want to resolve. Vendors have invested millions, perhaps billions, of dollars to create code, test and protect their product. The view of most software companies is that they will maintain the rights to any customized code and the right to incorporate it into future releases of the software. It is not unusual for a client's legal team to contest this position.

Prototype design, test, modify and roll-out

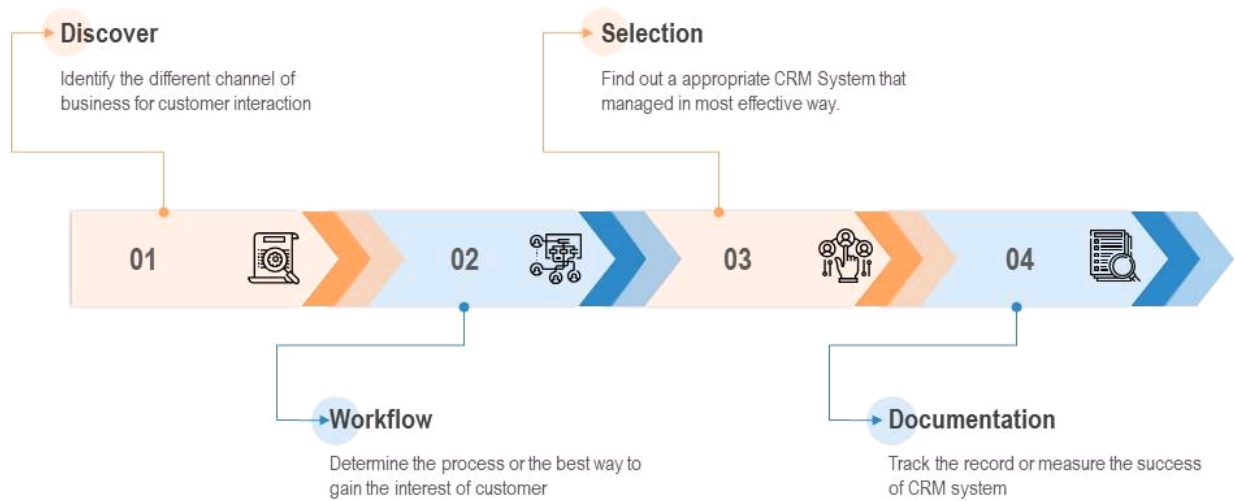
The output of this customization process will be a prototype that can be tested by users on a duplicated set, or a dummy set, of customer-related data. End-user tests will show whether further customization is required. Final adjustments to marketing, selling and service processes are made at this stage, and further training needs are identified and met. After a final review, a roll-out program is implemented. In larger companies this often is a phased roll-out. For example, a new sales-force automation system might be rolled out first to the champions those identified earlier as buying in both emotionally and rationally. A new service automation solution might be rolled out to newly acquired customers first, before the existing customer base is imported. The idea is to iron out any problems before company





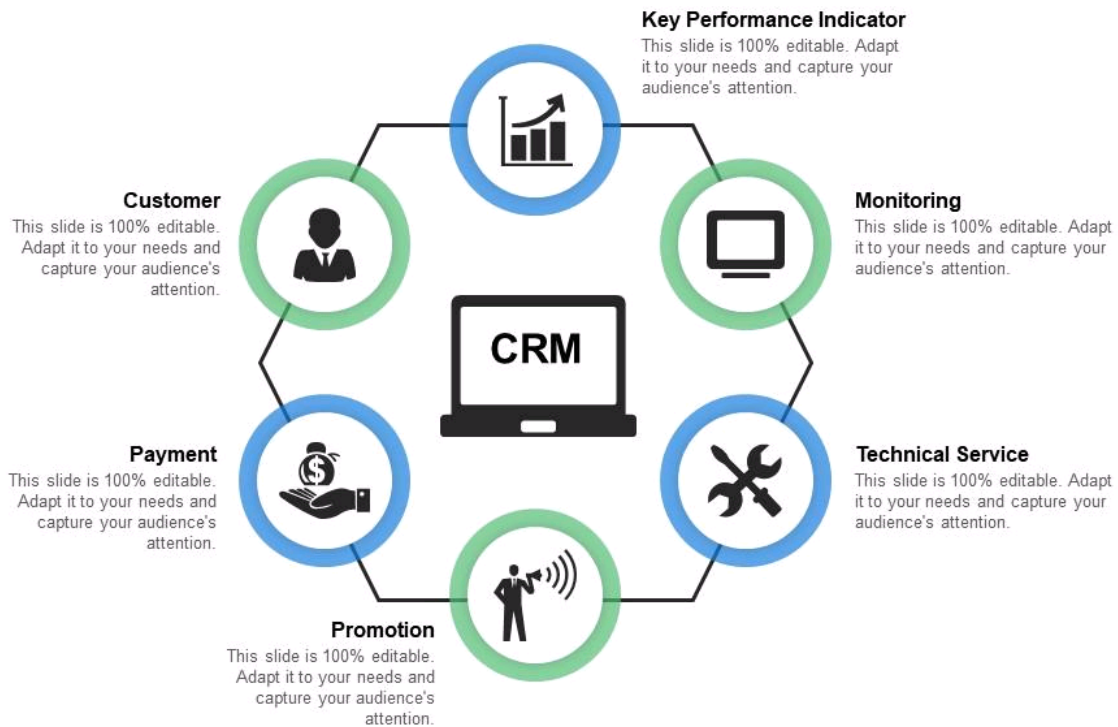
Plan of Action for Successful CRM Implementation

4 key Steps of our Process Framework



This slide is 100% editable. Adapt it to your needs and capture your audience's attention.

Customer Relationship Management Crm with Key Performance Monitoring Promotion and Payments



Conclusion

Customer Relationship Management is a business strategy that enables a business organization to maximize revenue, customer profitability through strategic organization and management of customer's interests and desires.

BWM has traversed numerous business challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification.