

Rules of the Road for Customer Management

The path to choosing the right customer management tool for your company.



The path to choosing the right customer management tool for your company has one logical starting point — good planning. For a successful end result, you must begin with an understanding of all the benefits an integrated customer management system can provide. Before you head down the road, use these rules as a guide to selection, implementation, and ongoing operation of a customer management solution.

Before You Start

There are several things an organization needs to understand before embarking on the search for a customer manager. Consider these four points to make sure you are off to the right start.

- Customer management is a philosophy — Are you ready to make a company-wide commitment to put the customer first? This means that at every level of your organization, you will view each transaction from the eyes of the customer by conducting customer-focused business practices.
- Customers are everywhere — When evaluating a customer manager, consider how you can best serve all groups that rely on your information: from clients to vendors, colleagues, and partners.
- Contact Management is not CRM — If you just need to manage basic customer data, and don't want to make a big investment, consider a contact management solution.
- Midsized companies have unique needs — Enterprise solutions have robust features, but they are typically designed for very large, global companies and quite expensive. Look for solutions that are easy to implement and use, can grow to meet your needs, and won't burden you with costly features that don't add value today.

Don't Judge Customer Managers by Their Price Tag

There's a common misconception that more costly systems provide more features and a better return on investment. In fact, price may just be a reflection of a vendor's position as a market-leader, and an expensive customer manager may include functionality you don't really need. Focus on finding a solution that meets your requirements and your budget.

Next Steps: Plan and Compare Options

A successful CRM implementation starts with careful planning. Create a strong business case with the investment costs in mind and build a team of stakeholders who can work together to drive the project. Once your team is assembled and has set a project charter, it is time to take a look at products. Here are four steps to ensure that you make the most of the discovery stage.

- Prepare for product demos — Do your homework about a solution before you invest the time to sit through an entire demo. Demos are an important step in identifying potential solutions, but you should first rule out those with technical requirements that don't match your IT platform or lack functionality that is essential. Once you've scheduled demos with solutions that are good fits, create a scoring system in advance

Five Signs of a Modern Customer Management Tool

It's important to select a solution that is based upon current technology. Steer clear of promises that are in the "development phase" but not available today. Also, don't settle for older technology that has peaked in the marketplace. Your solution should be:

- *Easily customizable to meet your company's evolving needs.*
- *Able to be implemented quickly with minimal expense.*
- *Easy to use and intuitive, with little or no training required.*
- *Also web-based, giving 24/7 access from virtually anywhere.*
- *Open for integration with your company's back office systems.*

to help with evaluation.

- **Focus on integration capabilities** — Look for a customer manager that offers back-office integration without customization costs and the flexibility to integrate with other business applications.
- **Insist on multi-channel access** — If your customer manager exists to support the customer, it needs to be accessible to help manage customer inquiries by phone, and email,. Your users will also get more from a customer manager that they can access via mobile devices.
- **Keep your options open with platform flexibility** — Today you might not have the IT resources to support an in-house solution, making an on-demand model the logical choice. As your company grows, you may want control and ownership over your customer data and therefore feel more comfortable moving to an on-premise solution. Choosing a product available on both platforms will give you the flexibility to change, without starting over.

A Smooth Implementation Ensures Success

Once you've selected a customer manager, be sure to keep your team involved in implementation, training, and rollout. Communicate progress regularly with all stake-holders and end-users. Proper management of the implementation phases will help you achieve a faster ROI.

- **Plan your implementation with company-wide goals** — It's fine to start with an implementation in sales or customer service, because those departments will use the system immediately. But, keep your eyes on the big prize — universal access to the customer manager — to provide maximum value across the organization.
- **Plan ahead for training opportunities** — Not only is it important to provide training in advance so that your customers don't experience the learning curve with employees; it is also essential to tailor training to a user's role and level of technical expertise. Solid training fosters higher user-adoption, and that is a paramount goal in any implementation.
- **Test, and test again** — The best software implementation testing will use mock customer data and walk through typical operations to identify potential glitches. Remember your goals — You chose to implement a customer manager because you wanted to be truly customer-centric. Take the time to survey customers and track their satisfaction levels post implementation, keeping in mind that your customers include end-user groups.

Choosing the right solution for your organization may seem like a daunting task at the outset. If you approach the selection and later, the implementation phases of the project, just focus one step at a time and you'll reach your desired destination: customer heaven.

About Sage ACT!

Sage ACT! makes it easy for you to have meaningful conversations with customers by giving you an organized view of the people you do business with. Like the millions of individuals in small businesses and sales teams who use Sage ACT!, you'll always be prepared with recent emails, meeting notes, task reminders, and social media profiles, because all of these details live in one place.

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