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FEATURE

100 Proven CRM Ideas, Part 2

...successful and disastrous: 90 bright ideas for your CRM strategy and 10 dim ones to avoid. Edited by David Myron

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by [Coreen Bailor](#), [Colin Beasty](#), [Jason Compton](#), [Alexandra DeFelice](#), [Marshall Lager](#), and [David Myron](#)
 From CRM Magazine June 2005

CRM projects fail--and succeed--for many reasons. When they fail it's often because they lack guidance. It takes a customer-centric vision across all departments and employee levels to be successful. It's a daunting task, but don't reach for the antacid yet: Our 100th issue provides some much-needed tips for success. We racked our brains, combed through previous issues of CRM, and spoke with industry consultants and project leaders to distill 90 bright and 10 dim ideas. We found that while the formulas for CRM success may differ, they include some or all of the 90 bright ideas.

Don't believe us? The proof is in the process. When CRM works, C-level execs make smarter decisions because they have a 360-degree view of corporate performance; salespeople increase their proficiency and close more deals; marketers create more targeted campaigns with better insight into their effectiveness; and employees--especially CSRs--become more productive and efficient.

Consider the 100 ideas list here a guide to proven strategies for starting or resuscitating your CRM efforts. The sales, marketing, customer service, and company-wide ideas are color coded to show where they best fit in the organization. We believe companies following these strategies are the ones truly committed to long-term CRM success. If we're wrong, you can give us 100 lashes with a wet metric.

51| Know when to back off. Give people time to figure out what they want. Especially in brick-and-mortar companies, don't attack people the moment they walk in the door. They may get intimidated; even friendly dogs can be scary.

52| Manage time appropriately. No one wants to stand on line or wait on the phone to make a purchase. Let time build relationships for you, not damage them. Train sales staff and invest in the parts of the customer relationship that matter most--keeping customers engaged with the company and speeding them on their way once they've made a decision.

53| Always know more than your customer. The Internet has created smarter shoppers, so the sales and support teams need to know more than product specs, service details, and competitor information. Knowing new-product ship dates and upcoming sales and promotion dates will create a more grateful and loyal customer.

54| Balance your agent pool properly. If you decide to outsource your contact center operations, don't choose offshoring just because labor is cheaper. Consider your and your customers' needs (e.g., follow-the-sun support and bilingual agents) to find the right mix of offshore, onshore, and

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near-shore agents.

55| Step out of the ivory tower. CSRs are often the best link between a company and its customers. Have the top brass step out of the executive suite and don agent caps for a day or, at the very least, shadow an agent. This simple effort will expose them to paramount issues facing CSRs, the contact center, and customers.

56| Be environmentally aware. Maybe it's time you jazzed up the beige cube farm you call a contact center. Your call center agents spend most of their time on the phone and in front of a PC, but that doesn't mean that their space has no impact on their morale or performance. Rejuvenate your agents and their surroundings by retooling the design of your center.

57| Hire creatively. Every team needs a squad of reserves to pitch in during tight situations, but why not step outside the box when bulking up your reserve lineup? When managing call spikes in your contact center, consider Voice over IP to enable stay-at-home-moms and retirees who wish to work part-time flexible hours from the comfort of their own homes.

58| Consider one architecture. Combining voice and data onto one VoIP network enables agents to work out of the comfort of their own home. These virtual contact centers provide lower operational costs, but still use the same call queue and customer data, which keep costs down. The beauty of it is that it's transparent to the customer.

59| Be proactive with surveys. Waiting for customers and partners to tell you their opinions is like waiting to be told to throw a live grenade. Ask before you act on a new strategy, or at least roll a survey out alongside the implementation. Keep the initiative with structured interviews to continue to capture every possible customer insight and need.

Complaint Department, Take a Number

60| *Take constructive criticism. Your least satisfied 10 percent of customers are likely some of your most vocal, and in their eyes you're doing something wrong. Make the effort to engage them to find out how to improve your service--your more profitable customers will thank you, and you just might rescue some of the bottom tier.*

61| *Create agents of change. Consider a system that manages good customer ideas. Call center agents should be able to capture customer complaints or suggestions electronically, which can then be reviewed and passed on to an executive who can implement change, according to Lior Arussy, president of Strativity Group.*

62| *Follow up. Let customers know when their ideas have been implemented. When customers take the time to suggest change and the company follows up and tells them those changes have been implemented, it makes the customers feel appreciated and important.*

63| One and done. Solving your customer inquiries on the first go-round to avoid repeat calls and additional costs will delight customers and keep costs in check. Empower agents with scripting and reporting tools, call flow and routing management tools, and order-tracking software. But keep a close eye on your hold times. You may be resolving issues on the first call--accompanied by outrageously large doses of piped-in music.

64| Dial 0 for assistance. Taking the IVR route can be effective and easier on your wallet, but some customers have complex inquiries that require a live agent or simply prefer the human touch. "That zero-out option...gives customers a choice," says Rosanne D'Ausilio, Ph.D., president of Human Technologies Global and author of Humanizing Your Interaction Hub. So make your employees available to customers.

65| Make information free and easy. If your objective is to minimize the number of times your customers press zero to wait for a customer service rep, don't just prevent them from interacting via a live agent. Instead, make information easily available through cost-savvy touch points like the Web or email.

66| Unify contact queues. Customers, regardless of channel, need to be consciously prioritized by the company, rather than punishing email, fax, and mail users.

67| Balance agent schedules with call volumes. If you have only a handful of agents on deck to field massive amounts of incoming calls, or if you're overstaffing against a modest call volume, map out your anticipated highs and lows and then staff the right number of agents at the right time. This will mean less stress on your staff at peak times, and you won't bore them into oblivion during lulls.

68| Play to agents' strengths. "Be careful not to assume that a good phone agent makes a good

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email agent," says Maggie Klenke, founding partner with The Call Center School. Instead of forcing agents into roles where they are likely to fail, maximize their skills by identifying strong points and matching them to their best roles.

Take a Load Off, Fanny

69| *Give me a break! Take a long road trip without any breaks on the way and you're likely to get tired of it. Your agents' eyes may not be heavy from hours of driving, but they might be closing from staring at a computer screen or from endlessly answering calls with no time to kick their feet up. Incorporate time away from the computer and phone into their schedules to spur productivity and reduce at-work aggravation.*

70| *Back off, big brother. Your agents are under enough stress interacting with sometimes infuriated and rude customers, so don't add to it with supervisors hovering over their shoulders. Monitoring your agents is essential to determine if they are meeting company standards and objectives, but consider quality-monitoring tools to decrease that unnerving overseer element that may be affecting their performance.*

71| *Rreduce stress with levity. Smiling in person shows a customer you want to be there for her. Smiling on the phone comes through with the tone of your voice and your attitude. This is more than a platitude--it's been proven in studies. If you look and sound friendly, they'll want to seek your help in the future.*

72| Stay ahead of the communication curve. The gen-Y sect isn't the only group that's attracted to some of the newer channels like instant messaging and blogging. Trendsetters come in all ages, so take heed and communicate with your customers the way they want to, and familiarize yourself with the lingo and trends to show that you're in line with their needs.

73| Listen! Communication no longer is a one-way street going from marketers to consumers. Companies need to focus on their inbound messages as much as their outbound ones. Listening to consumers' complaints, concerns, and desires will help enhance the customer experience and could result in additional revenue streams or just some bright ideas.

74| Anticipate customer needs. Focusing on the quick sale does nothing for relationship building. So think long term: For example, someone shopping for a newborn might appreciate a promotional offering a month later for a four-to-eight-week-old.

75| Tchockes go a long way. Trinkets, swag, premiums--whatever you call them, people love to get them. Not only will a bottle opener or notebook with your logo make customers happy, but it also provides free advertising. Why do you think so many companies print T-shirts?

76| Consolidate communication. Yes, it's your job to interact with your customers, but don't pelt them with information from all angles. For instance, make sure that your sales departments and marketing departments are not sending your customers the same information. You hate hearing the same things over and over again. So do your customers.

77| Quality over quantity. You're in the driver's seat when it comes to building customer relationships, but speeding through your interactions with them can crash a developing relationship. Whether on the phone or in a face-to-face meeting, don't risk losing a cross- or upsell opportunity by rushing through customer correspondences for speedy completion rates. When flowers and chocolate won't help build long-lasting relationships, time and effort will.

78| Automate processes. Having customers enter their personal information on a Web site versus providing it to an agent over the phone reduces the potential for human error. Also, customers may feel uncomfortable revealing personal data like medical and financial information to another person. But be careful, customers are more likely to lie online, as agents have a keen ability to determine whether or not the caller is Donald Duck.

79| Everyone owns the customer experience. The CCO may quarterback the customer experience, but you can't complete a sales play without linemen, backs, and receivers. In a recent destinationCRM.com poll, 46 percent of respondents indicated that customer service is in charge of owning the customer experience--that means that marketing, sales, and IT comprise the other 54 percent. Whichever department it is, promote individual responsibility there so that everyone has a hand in building customer loyalty.

80| Learn to Adapt. Businesses change, so CRM and its related technology must also. From regulatory changes to mergers and acquisitions, every shift in the external business climate can require corresponding moves in strategy and business processes. Businesses need technology infrastructure that can respond to rapid change, and be agile and flexible.

81| Respond quickly to customer queries. Whether they send an email or leave a message, or come to the service counter, customers' time is precious. No one wants to sit around waiting for an answer. Even if the immediate answer is "I don't know, but I'll find someone who does and I'll get back to you," that at least says you've heard them. Studies show that most customers are

happy with a response within 48 hours.

82| Find cheerleaders. Many elements of CRM strategy focus on locating a company's best customers, typically with hopes of duplicating that success and making the relationship even more profitable. Consider turning your best customers into credible advocates for peers by building a better pool of reference customers--they don't even have to carry pom-poms.

83| You don't have to be Jack. We've all heard the expression "a jack of all trades, a master of none." If your company has extreme strengths in a particular market, it may be better to focus on your core competency and outsource other areas, such as sales, customer service, or market research.

84| Don't ignore soft skills. Knowing the product isn't enough, as anybody who's taken meetings with an engineer can tell you. Employees at all levels of your organization, especially those on the front line, should practice people skills.

85| Come again? Customers opt out if you make them repeat the same information over and over, or type in their information only to have to speak the same details to a live agent. When customers start memorizing the order in which questions will be asked and providing you the information before you even ask for it, things are out of control. The goal should be one and done when giving account information.

86| Be mindful of corporate culture. "You can have all the talent in the world, strategic and management processes, and incentive plans at a ten, but if your culture is at a three, guess how much of your business plan gets implemented? No more than 30 percent," says Dr. Fred Johnson, CEO of InitiativeOne. "Your culture will set the limits of how far your company will go."

87| Spy on the competition. Don't shy away from auditing the best processes of your rivals. Looking at your competitors' practices can give you a competitive edge. Trying to reinvent the wheel is counterproductive. Instead, enhance the wheel that's already in motion.

88| Don't let the "gotchas" get you down. When going through the process of implementation, every unforeseen obstacle is just another opportunity to improve your processes. For this, just watch Chevy Chase in any of the National Lampoon's Vacation movies and you'll get the point--you're learning the value of family, and your customers and employees are that family.

89| Don't throw good money after bad. Spending more money on a new application to fix a problem isn't always the answer. Many times, realigning what you already have and leveraging current applications to gain new functionality or services can solve the problem. "Many times, there's a lot of functionality and potential with what you already have, and you don't even know it," says Martin Schneider, enterprise analyst at The 451 Group.

90| Leave room for expansion. Today you may be a pocket-size startup, but in time your fledgling company may develop into a larger entity. Shy away from limiting yourself by making sure your CRM platform is flexible enough to handle your potential growth.

DIM IDEAS

91| Hiding from customers. All you companies that have taken your phone numbers and direct email addresses off your Web sites, or disabled 0-for-operator on your IVRs? Shame, shame, shame.

92| Pitching adaptive pricing as a consumer benefit. Tell that to California power customers who remember rolling blackouts and sky-high spot prices.

93| Let the IT department specify and buy the CRM system. This would be a good idea if CRM were only a technology issue.

94| Out of sight, out of mind. When your kids are off to summer camp it doesn't mean you stop thinking about them. Well, at least we hope not. The same goes for your contact centers and your agents. Neglecting those centers and agents that are located away from your headquarters can lead to customer information slipping through miscommunication cracks, and a feeling of abandonment among dejected agents.

95| Making the return process a nightmare. You're paying employees by the hour to aggravate customers only to give them, in many cases, what they rightfully deserve in the end.

96| Overpay for new customers. Paying more to acquire customers than you are willing to spend to keep them is a recipe for churn.

97| Letting offshoring become political. Fewer people would have noticed if the service were better.

98 | Automate only one group of users with the same job title, instead of automating a process that incorporates multiple departments.

99 | Assuming every agent can cross- and/or upsell. To turn contact centers into revenue generators, some managers encourage their agents to cross-sell or upsell whenever possible. The critical slip-up, however, is assuming that every agent knows how. Train your agents to capitalize on these possible revenue opportunities, instead of forcing them into roles that they're not equipped to handle.

100 | Focus on sales and not on marketing. What good is requiring sales reps to enter their leads without integrating their systems with the marketing department's system?

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