



# **How World Class Companies use the CRMA Eight Business Disciplines to their Advantage**

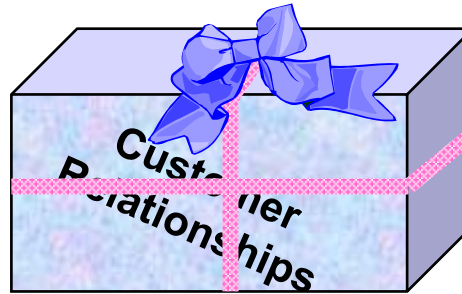
**Advantage Global Communications CRM ROI  
Conference**

**July 16, 2003**

**Bob Angel**

[www.gilfordgrp.com](http://www.gilfordgrp.com)  
[www.crmacanada.com](http://www.crmacanada.com)

# Eight Business Disciplines



CRMA has traveled around the world, talking to leading authors , consultants, research analysts and educators about the requirements behind making CRM initiatives a success. The experts have indicated that an Enterprise Performance Management view of CRM is required.

What are the eight disciplines that are required to build an Enterprise Performance Management view– where every dollar spent on CRM and related initiatives can be tracked back to the result of the program where every person in the organization knows the next step in the program. Bob Angel of the CRMA Canada presents the eight disciplines and explains how your company can apply them to create the right environment for delivery of a successful, measurable CRM program.



# About Gilford & CRMA



- Client relationship and marketing strategy
- Methodologies for events and business cases
- Marketing management and business requirements background
- Philosophy: it's all about relationships
- Director CRMA – *The industry association dedicated to the dissemination of credible and unbiased knowledge regarding the practice of Enterprise Performance Management Customer Strategies*

- Business case
- Strategic initiative
- Change management
- Executive commitment
- Customer experience
- Big picture sharing

CRMA Best Practices Benchmarking Study-

Enterprise CRM  
Industry Report Card 2002



Retail &  
Retail Products  
Sector



Telecommunications  
Sector



Financial Services  
Sector

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Enterprise CRM Knowledge  
[www.crmacanada.com](http://www.crmacanada.com)

# CRMA Canada Learning Management System

1. Fundamentals – 8 required disciplines
2. Change Management
3. Collaborative process design
4. Performance teams
5. Discovery Phase & Business case

***CRMA Education & Research for Enterprise Performance  
Management CRM***

# Positioning for Profitable Relationships

Enhance understanding of *individual* customers' needs and preferences to:

- Build deeper and more enduring relationships
- Create a loyal following of profitable customers
- Foster customer loyalty and trust
- Offer optimal solutions/referrals



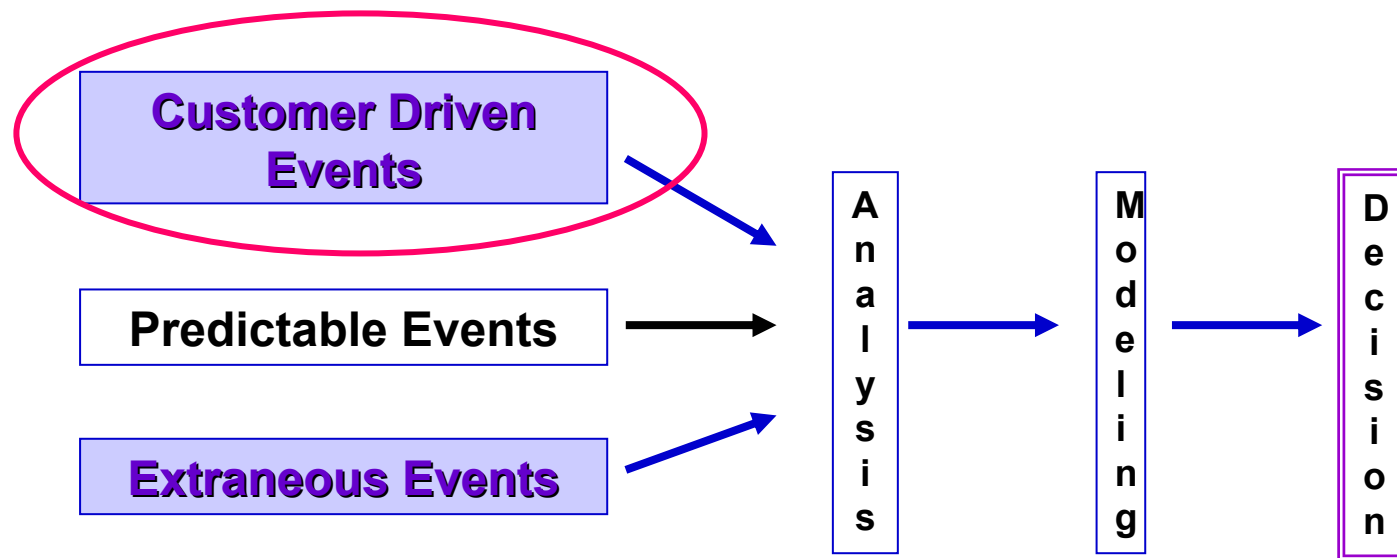
## Putting it Simply...

- Which customers is it most important I contact today?
- How should I contact them?
- What should I talk to them about?

.....to maximize value (or potential value) in your relationships?

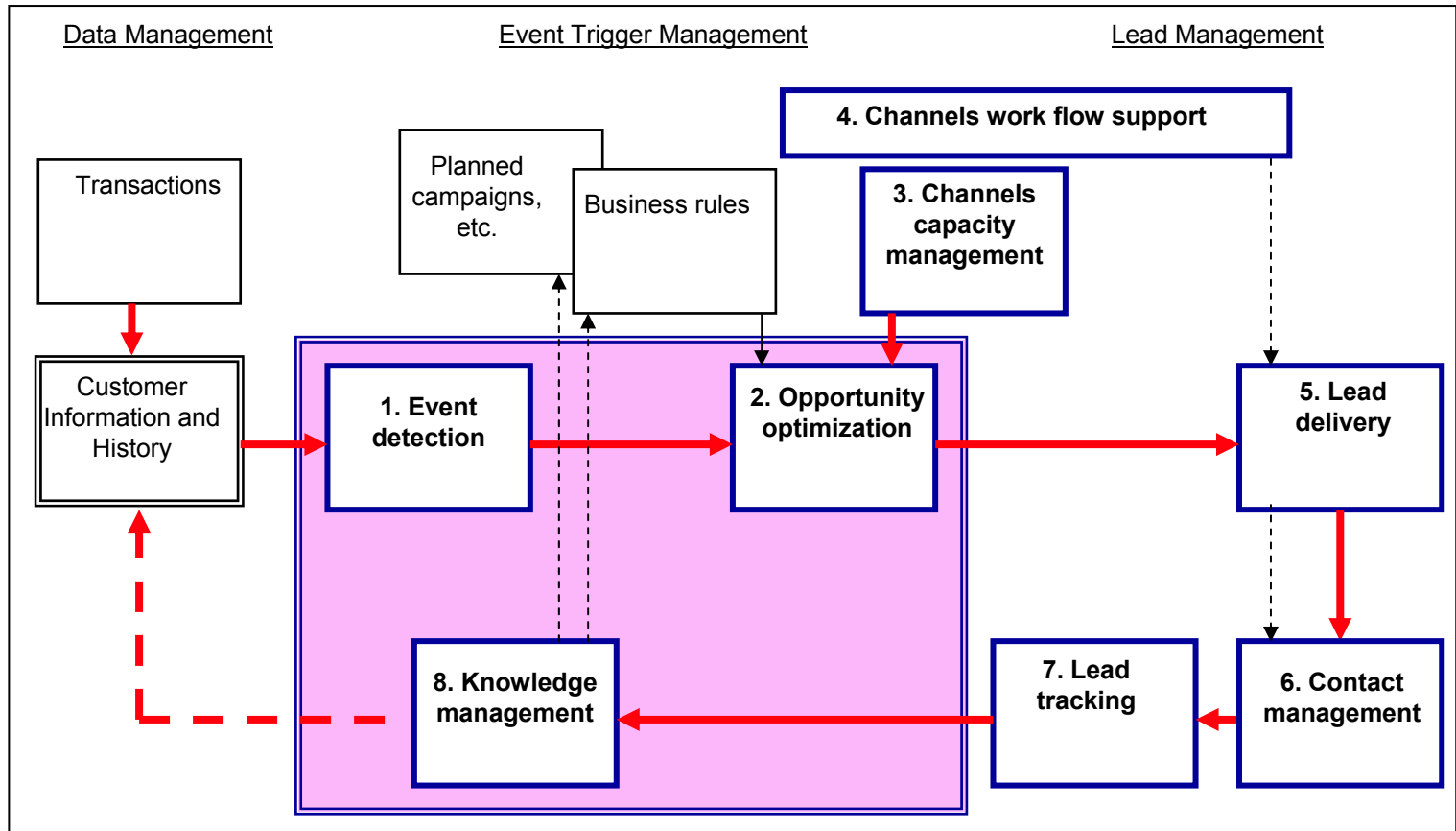
# Objective: Daily Event Marketing

## *Focus on Behavioral Events for Payback*



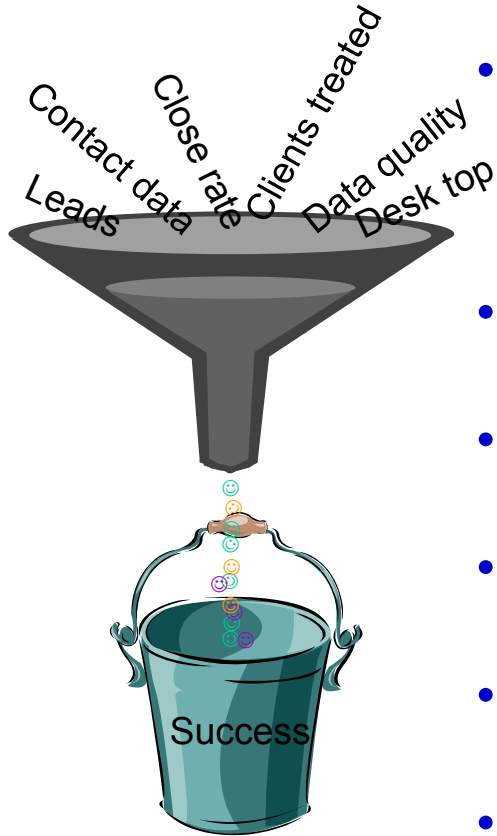
- Identify **significant** events in the lives of clients
- Communicate with selected clients within 24 hours
- Differentiate in an increasingly commoditized market

# End to End Closed Loop Process



- Tracking/measurement guides strategy, recalibrates business rules
- Reporting analyzes overall results

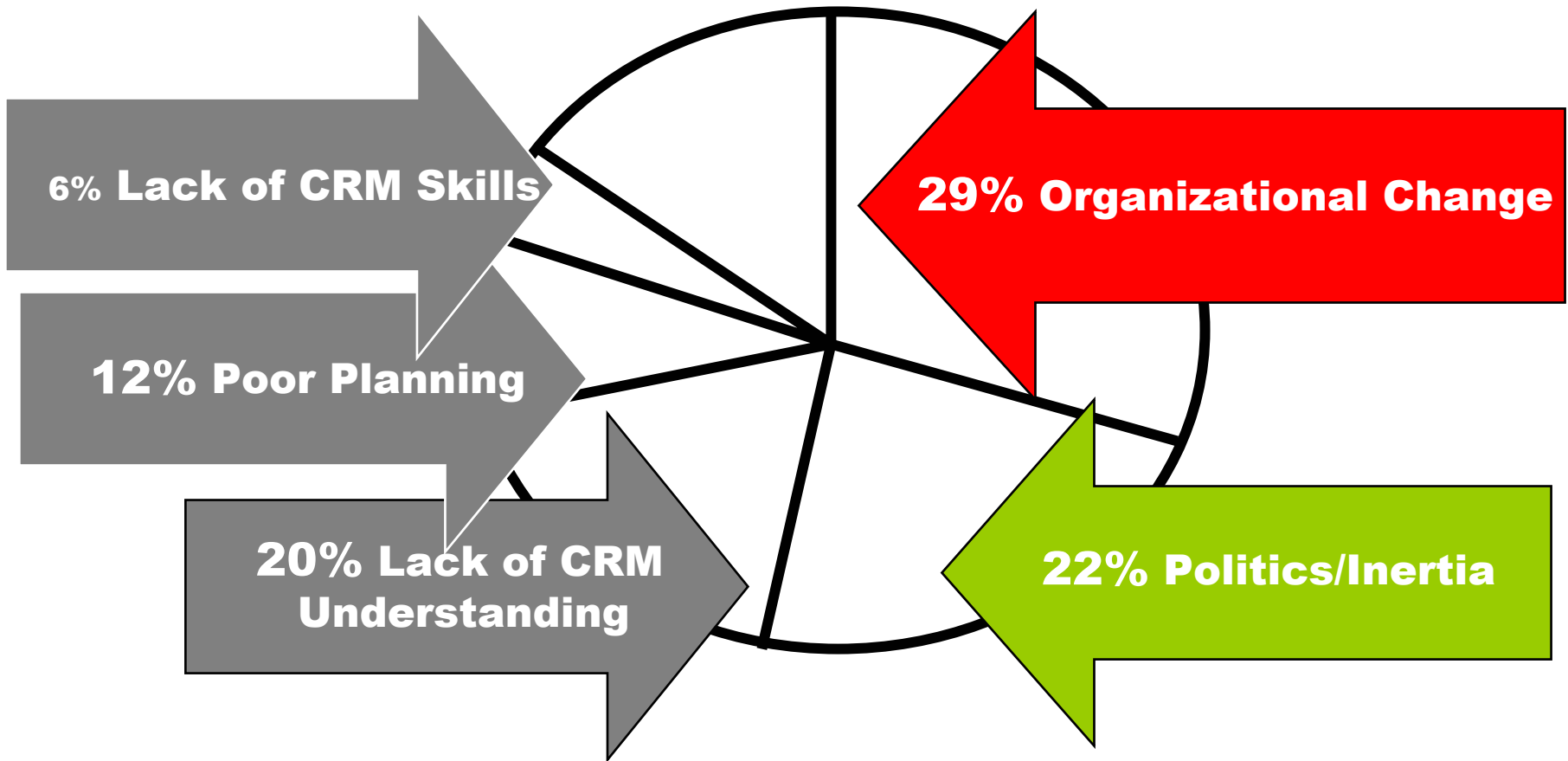
# Event Triggers are Driven by Business Rules



- Every contact increases knowledge of the individual customer
- Everyone can pro-act on opportunities and threats
- The best leads are acted on
- Leads are business managed
- Service level depth can be enhanced
- Contact fatigue is minimized
- Customer privacy is respected



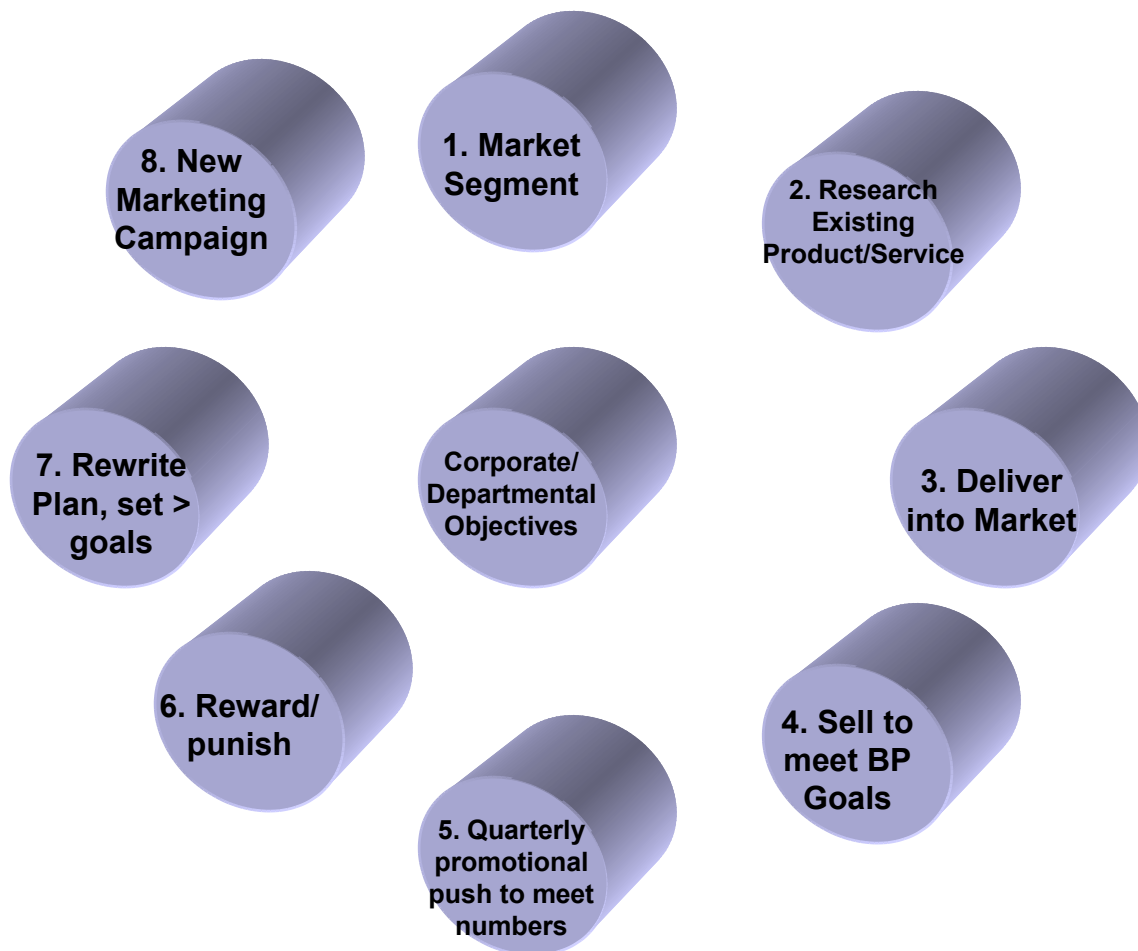
# The CRM Failure Story



CRM Forum.com, UK 2001

# Traditional Product Push CRM

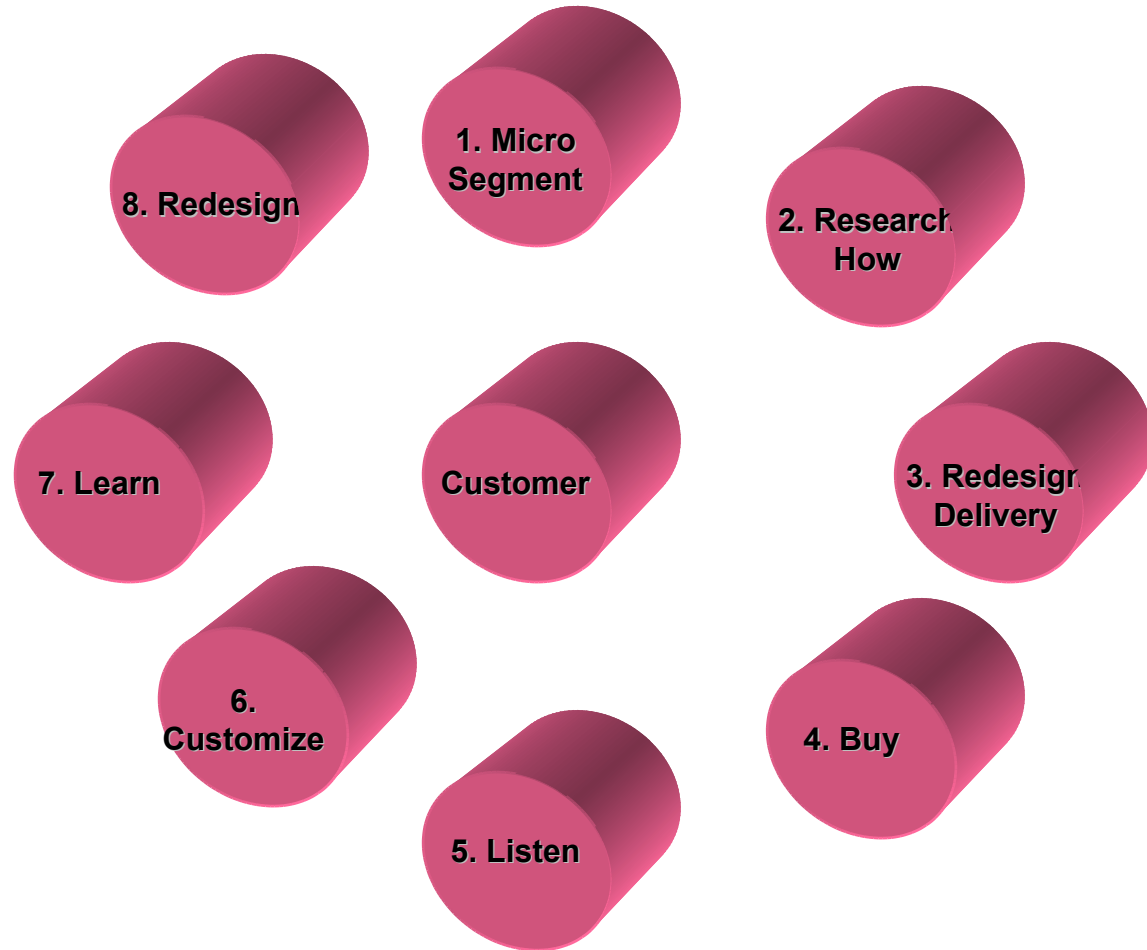
*eCRM – product push, superficial personalization, & intrusive advertising*



**Past – Product push and internally focused**

# Enterprise Relationships

***eCommerce –  
channel  
transparency,  
redefined value  
for customers,  
understanding  
of customer  
priorities***



**Future: Move → Customer focused, performance managed, adaptive enterprise**

# The 3 Spheres of Enterprise CRM Influence...



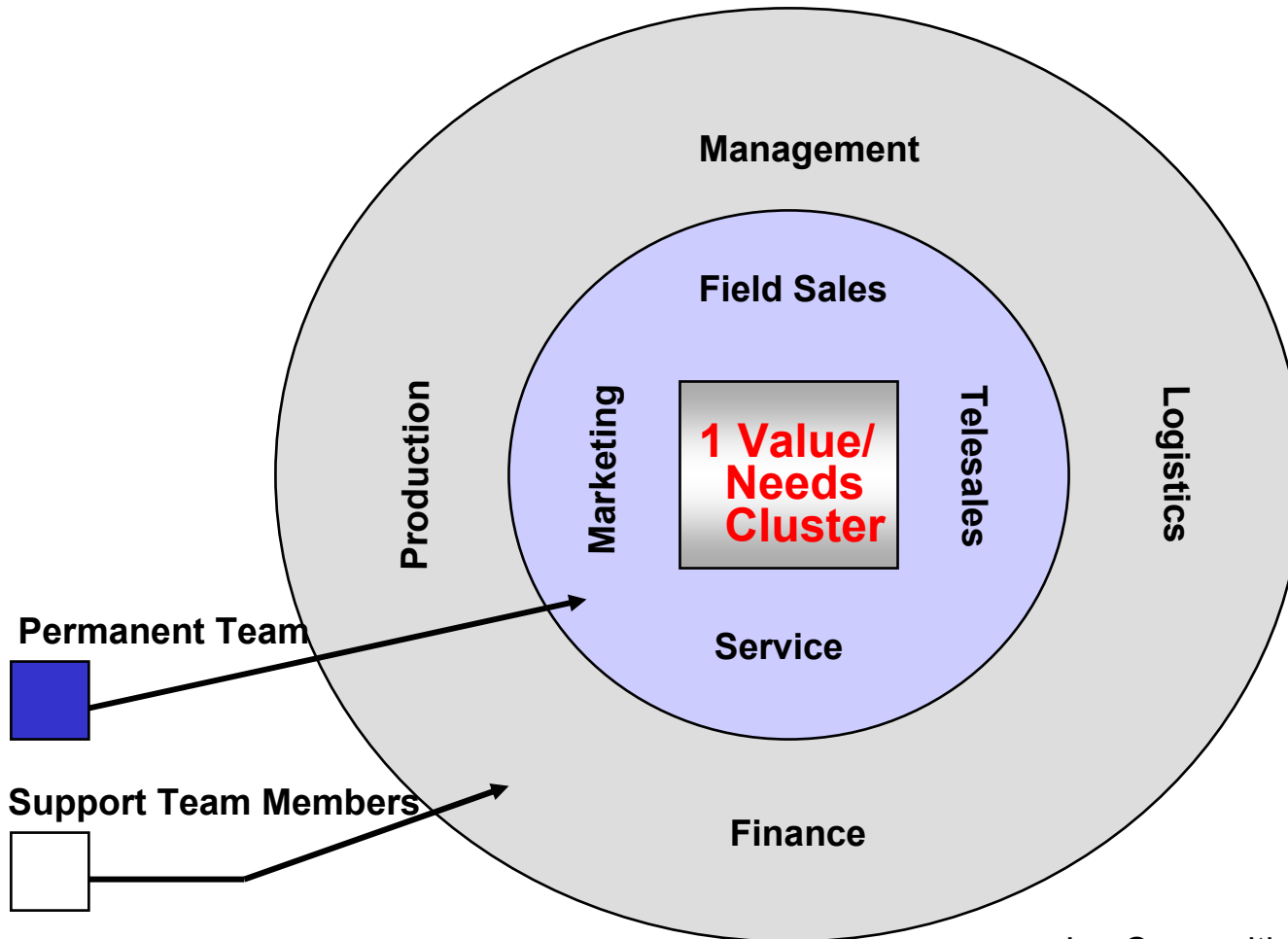
Enterprise Customer strategies require new people with new enterprise skills

# **CRMA's Enterprise Strategies Disciplines Framework**

## **THE EIGHT BUSINESS DISCIPLINES**

- 1) Professional Change**
- 2) Business Management Change**
- 3) Marketing Strategy Issues/Impact**
- 4) Market Research Impact**
- 5) Business Model Redesign**
- 6) Business Process/Org Redesign**
- 7) Technology Role/Impact**
- 8) Implementation Methodology/ Impact**

# Organizational Redesign



Jay Curry with Adam Curry

# CRMA's Enterprise Strategies Disciplines Framework

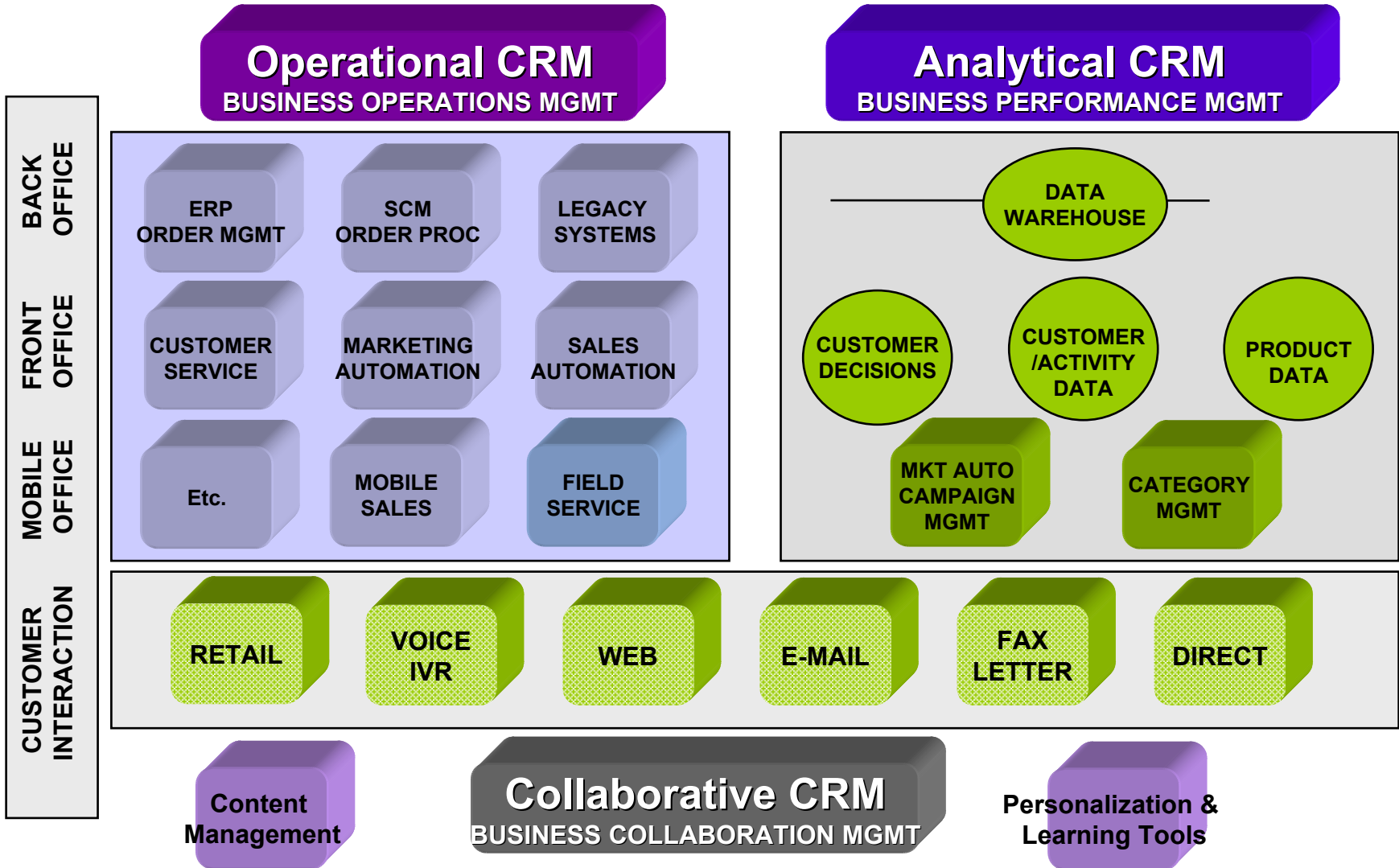
## THE EIGHT TECHNOLOGY DISCIPLINES



# Enterprise Level Strategies - CRMA

Customer Relationship Management Association CANADA

## Unique Tool Mix for Each Company



*Business requirements should determine tool choice*

# Summary: Looking for Best in Class Approaches



- Event marketing to understand clients
- Individualizing service and communication
- Micro-segmented customer base
- Customer value calculated monthly
- Flexible decisioning and business rules
- Prioritized up-sell
- Retention strategies in place
- Culture change management
- Business case tied to ROI goals