AUTOMATING CRM PROCESSES

TaskCentre®

Sales and Marketing Automation with Interactive Workflow - A Guide to Intelligent CRM.

Real-Time CRM

TaskCentre® for CRM Solutions

Delivering the untapped capabilities of your CRM application

Business Application Enhanced

Customer Relationship Management (CRM)

Module

Sales and Marketing Automation with Interactive Workflow

Business Goal

Increased Profits through Intelligent CRM

The knowledge you will gain from this paper:

⇒ A true clarification of what CRM professionals have been seeking for over 20 years.

⇒ The problems that CRM professions commonly face and the historical strategies that companies have adopted in response.

⇒ The emergence of Sales and Marketing Automation with Interactive Workflow technology for CRM applications and its empowerment of the CRM professional

⇒ Real-life illustrations of TaskCentre® for CRM applications that will strike a chord with every CRM professional

⇒ The business benefits of Sales and Marketing Automation and Interactive Workflow to the CRM professional

⇒ A summary of the functionality available to the CRM professional

Introduction

The competitive arena is evolving on a second-by-second basis and no company is free from the effect of commercial rivalry. Indeed, as Customer Relationship Management (CRM) professionals readily confess, the relentless jostling for the acquisition of new customers or the retention of existing clients has now become precise arts in their own right.

Yet, throughout the evolution of CRM, one thing has remained true; the customer is king. Industrial analysts from both the technical and non-technical arenas have predictably revamped this old-age marketing truth with phrases such as 'Personalisation,' 'One-to-One Marketing,' 'Customer Experience Management" and today's latest mantra 'Customer-Centric' marketing. Unfortunately, the fact remains that nothing has really changed in 20 or so years. It's all about who can fulfil the customers needs cheaper, quicker and in the most personal, professional and intelligent manner.

In pursuit of this Holy Grail of CRM, many organisations have deployed the powerful CRM application, SalesLogix and brought about greater structure, meaning and professionalism to the management of their customer relationships. Furthermore, CRM systems have facilitated strong business forecasting, increased accountability and visibility of the marketing department and made a solid contribution to organisational growth.

Yet, although the success stories of CRM systems are well documented in industrial circles so is CRM's achilies heel; its complete dependence on people.

This guide seeks to highlight why the total reliance on the manual use of the company CRM system is resulting in a unnecessary risk to customer satisfaction, the loss of revenue and how the marketing automation and interactive workflow capabilities of TaskCentre® have made this solution a the 'must have' module for custodians of CRM application seeking CRM perfection.

TaskCentre Examples

- **Advanced Business Alerts**: Be alerted when key data is altered, activities have not been completed, the price of your products change, product lines are out of stock, a key client does stops buying or when service levels are/are not achieving company targets.
- **Document Automation**: Automate the construction and delivery of sales reports, KPI's, weekly pipeline figures, account manager performance reports, introduction/welcome/upsell/cross-sell communications or customer documentation.

What's your problem?

Your problem is the same as it's always been; The ever-increasing gap between the speed of commerce and the capabilities of your staff. This is showing no sign of decreasing and your company's core business processes are coming under increasing scrutiny from key stakeholders.

This is because people have physical limitations, make errors and suffer from imperfect knowledge. The volume of work that the average CRM function now processes outstrips the actual capabilities of the employee. Consequently, shortcuts are being made and your CRM investment is becoming increasingly underutilised.

All-too-common examples that will strike a chord with companies using a CRM application include, users not creating a new client record, setting an activity, archiving sent and received e-mails, incomplete or incorrect data or simply not having enough time to identify important activities or records when contact or administrative tasks are required. The problems that are created from just these few examples are having a detrimental impact on the company's commercial performance today.

Another major issue for CRM professionals globally is the increasing disparity between the CRM user's ability to fulfil a request for information and the expectations of customers.

Tip

Automate the protection of critical data or enforce company data entry rules for documents such as contact details, product pricelists or approved discount levels using TaskCentre's SQL trigger, Query ODBC, Format at text and Send as SMTP.

Your options

There are four theoretical options open to the CRM professional who is seeking to address the problem of the rapid pace of commerce, expanding workloads and ever-increasing customer expectations. These are:-

⇒ **Employ more users to administer your CRM system**

⇒ **Extract more value out of your existing CRM users**

⇒ **Do nothing and find better ways to 'fire-fight' issues as they arise**

⇒ **Add marketing automation and interactive workflow capabilities to your CRM application**

Option 1: Employ more users to operate your CRM system

If you have the luxury of capital available you could employ more CRM application users. The immediate benefit should be that your response times should decrease to the degree where you may achieve 'near-time' responses to customer requests and issues.

Unfortunately, this approach of course is dependent on the availability of capital not only to employ more users but to provide them with sufficient training and ongoing support. Furthermore, there would be a user leaning curve and your company will have to purchase additional user licences which will need to be built into the planned expenditure.

It should also be stressed that further CRM users will not address many of the fundamental issues facing the CRM professional.

For example, a new operative can be just as likely to make a data input error as those that preceded his/her arrival. Furthermore, customers expect real-time responses and interactions with your company and only event-driven, self-handling infrastructures can deliver this. People have physical limitations.

Finally, who will monitor and report on that performance of your marketing activities and your CRM application users? Does your company harbour a manager with sufficient time to spare to create and distribute increasing numbers of reports or statistics?

Realistically, employing more CRM users is a short-term, limited response to a more complex problem.

Option 2: Extract more value from your existing CRM application users.

It is widely accepted that 99% of all application users could increase their capabilities and/or output through additional motivation and training. Indeed, many research papers have shown that with the right blend of managerial motivation and on-going training, greater efficiencies can be achieved throughout the CRM function and indeed the wider organisation.

Once again, you may be able to instil better CRM practices and generate higher standards of CRM but does extracting more from your user address all the issues facing the CRM professional? No.

The law of diminishing returns dictate that there becomes a point where an input (additional training or a new member of staff) will deliver less value than the input that preceded it. Furthermore, even in smaller organisations better training and motivation does not and cannot satisfy the customer's growing need for real-time, personal interaction with your company.

Better trained and motivated users do not fully address the ever-increasing workloads that are prevalent throughout many organisations. For instance, how many times has your organisation failed to send the appropriate service/ contractual renewal documents to clients within the specific time period? More importantly, how would you know if a CRM user had not done this! The answer is simple, you wouldn't. It's physically impossible to manually monitor every action of your CRM users.

Option 3: Do nothing and find better ways to 'fire-fight' issues as they arise.

Unfortunately, due to the evolution of CRM applications and the financial realities for the vast majority of organisations throughout the UK, the industry is littered with illustrations of instances where organisations have established 'steering groups' or 'management teams' to deliver reports or KPI's on the company's performance for a given time period. Yet, in reality, all these groups are actually doing is 'fire-fighting' or 'reporting' the symptoms of a much more complex problem. Yes, senior decision-makers may react to these reports by refocusing the efforts of the CRM team on one or two specific areas but is this not the CRM equivalent of 'take from Peter, give to Paul'?

In short, fire-fighting, as we call it, has been blended with options one and two over the years in an attempt to resolve the fundamental issue that has been plaguing the CRM professional for years; ***vanilla CRM applications are reliant on the user to extract and deliver value.***

Fire-fighting is not a long-term, intelligent answer to the complex problems facing the CRM professional. It can help to resolve short-term, operational/tactical issues but ultimately it is a reaction to a historical event.

Option 4: Add sale and marketing automation and interactive workflow capabilities to your CRM application.

The marketing automation and interactive workflow is rapidly becoming the most talked about approach to CRM by industrial analysts and CRM professionals alike. But what exactly is marketing automation and interactive workflow?

These two functional capabilities are the broad sweeping business benefits achievable through the addition of a Pure-Play Business Process Management (BPM) solution to CRM applications.

Through a simple drag and drop planner, CRM professionals can use BPM tools to strategically automate business process in line with company rules and procedures. Indeed, it is this flexibility and the power of BPM tools that drive CRM vendors to partner with 'pure-play' BPM vendors and their solutions.

To illustrate marketing automation more clearly, lets consider an example: A typical machine servicing company. Each day, week or month its clients approach the end of their contractual agreement with the given company.

In response to this typical customer lifecycle, a company CRM user sends out renewal contracts on key dates until the contract is about to lapse. Each communication could harbour a sliding time-based discount.

To support the above, the CRM user

TaskCentre Examples

- **Subscriptions & Request**: Enable property seekers to request property details by sending an SMS text message to a short code placed on a For Sale board or facilitate automated news subscription services so that your customers/trading partners receive business information as it happens.
- **Integration**: Connect all the company's applications so that financial data can be passed from remote office application and automatically written into the primary accounting solution or facilitate the automatic archiving of e-mails within a specific business application.

Tip

Take the wasteful administration out of CRM by automating reports such as the daily/weekly/monthly sales pipeline, number of calls made by CRM users, revenues for the day/week/month or product line profitability. Also set up real-time exception reports for hotspot issues.

archives all his/her e-mails and sets an activity for a follow-up call.

By adding sales and marketing automation capabilities to CRM applications, the only activity the company would have to make would be the follow-up call. Everything else from renewal identification, document creation, customer communication, archiving and activity setting would be automated. No client would ever miss an offer of renewal and, if required, automated reports on activities completed/uncompleted can be sent to line managers.

Interactive workflow is the functional capability that CRM professionals have been demanding for years and through BPM technology, this need is now being met.

To illustrate how interactive workflow can help CRM users, lets continue with the example of the machine servicing company.

Like most commercial enterprises today, the company's web site offers potential clients the opportunity to download documents, such as brochures or price lists, in return for entering their details within a form.

Following this event/download, the CRM user would manually enter the information into the CRM application, possibly send a polite introduction/ welcome e-mail/letter and then set an activity to follow up.

By adding interactive workflow capabilities to the CRM application, this entire process can be automated and enhanced. For instance, once the web visitor has submitted their details, TaskCentre would automatically capture the information, create a new record (or add a new contact to a record if the record already exists), send out and archive an introduction/welcome e-mail/ letter and set a follow-up activity.

TaskCentre Examples

- **Web Content Publishing**: Automatically FTP new product prices to the company web site, a product order and delivery details to an intranet for warehousing and logistics, account managers' sales performances into a secure extranet and real-time service levels to an intranet for the telesales management team.
- **Workflow**: Never have to enter a web site generated lead in to your CRM system again, enable employees to dynamically receive documentation for their contribution or increase the visibility of account changes via e-mails that harbour smart tags.

In addition to the above, your new CRM application module could automatically distribute e-mails, inclusive of smart tags, to senior decision-makers so that they can drill down into the new account. No manual intervention would be required thus ensuring complete compliance to company protocols.

The illustration is just one very basic example of what marketing automation and interactive workflow module can deliver to your company.

Business Benefits

The business benefits that marketing automation and interactive workflow technology can deliver your company are both generic to your CRM application and specific to your industry. However, below are just few examples of what this technology can provide to your company:-

- ⇒ Higher customer acquisition and retention rates
- ⇒ Intelligent complaints handling
- ⇒ Better customer lifecycle management
- ⇒ Eradication of the company's manual administrative processes
- ⇒ Event-driven marketing
- ⇒ Self-handling infrastructure that delivers true, real-time CRM performance
- ⇒ Reduced operational costs
- ⇒ More effective use of your most important resource, your employees.
- ⇒ Policing, protection and enforcement of company data policies
- ⇒ Increased visibility of employee or company performance through automated reporting and dynamic workflow
- ⇒ Failure avoidance through exception reporting
- ⇒ Automated handling of 'unsubscribes' from e-mail campaigns

The list of business benefits that marketing automation and interactive workflow can deliver is endless and the examples to the left are just a small sample of what you could achieve through TaskCentre's BPM tool kit.

Need More Information?

To learn more about TaskCentre, its technical features and the experiences of other companies who currently utilise TaskCentre's Business Process Management Solutions please visit:

www.orbis-software.com

or call us on: **01202 241115** now

Tip

Give your stakeholders real-time, automated access to the reports they need such as delivery times, products purchased, order status update or trading partner status through TaskCentre's SMS or SMTP triggers.

About the Company | Orbis Software

Orbis Software provides the leading pure-play Business Process Management and Workflow solution, TaskCentre, enabling organisations to drive efficiency and reduce costs through collaborative process automation.

Founded in 1997, Orbis Software Ltd provides a scalable suite of applications to suit any size of organisation. There are more than 4000 organisations around the world already using Orbis products, including such names as Nasdaq, Telstar, BP, BDO Stoy Hayward, GE Capital Equipment, The Rank Group, Salomon Brothers, Zenith, BUPA, Jaguar, Lloyds TSB, and Rolls Royce.

For further information please contact:

Orbis Software,
25 Bourne Gate,
Bourne Valley Road,
Poole,
Dorset,
BH12 1DY.

Tel: 01202 241115
Fax: 01202 241116
Web: http://www.orbis-software.com