



CRM Business Consultancy  
Empowering technology for marketing success

# CRM ESSENTIALS

## A guide to making CRM pay for you

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# CRM ESSENTIALS

A guide to making CRM pay for you

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Summary

# THIS GUIDE IS WRITTEN – FOR YOU

So much has been written about CRM by IT suppliers & consultants interested in encouraging investment in hardware and software platforms to enable multi-channel customer communication, and CRM programmes in theory to be executed.

This guide aims show how CRM really works for the CEO, the Finance Director and above all for both Sales and Marketing Directors. Of course appropriate systems and business procedures are essential and investment, in the right circumstances, will be needed. Nevertheless at TARRYSTONE we recognize that the CRM concept and associated investment is more widely based. It also involves enhancement to people skills, cultural and organizational change, and most of all new sales and marketing initiatives if the full financial benefit of CRM is to be realized

This **CRM Essentials Guide** is an introduction to all the areas we feel have to be addressed in making CRM work for any organisation. It is based on the experience of TARRYSTONE senior consultants working in this arena over many years.

So if you are about to embark on a CRM initiative or are finding your CRM project is not delivering operationally or in ROI terms, we hope that this guide will provide a check list for your thinking.

If you would like to learn more from an initial exploratory discussion with one of our senior consultants specializing in your market sector please call...

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# DEFINING CRM

**E**very company will have its own definition of **Customer Relation Management**

It will depend on the nature of your business, its stage of development and the degree to which there is a financial benefit from servicing and developing customers.

**A**t TARRYSTONE we use the following definition:-

***CRM is the understanding, acquisition, servicing, development and retention of customers for profit by an organization with a truly customer focused culture using an integrated, customer centric contact strategy, systems and processes.***

**W**e believe that it is a statement of intent as to how a company adopting CRM intends to implement and develop its business vision. Within this all-embracing ideal there many small stages that move an organization towards the ideal and each in its own right can improve profitability.

**S**ome initiatives will be aimed at top line revenue gains retaining and selling more to customers. Others will be aimed at efficiencies in customer servicing.

One or more of 4 types of investment are needed ;

- 1. Research and data management to understand more about customers**
- 2. Efficient systems and processes to service customers no matter which communication channel they prefer to use.**
- 3. Marketing expenditure**
- 4. Investment in cultural change and people skills throughout the organisation to improve a customer's brand experience and to give more customer contact options to the business.**

**A board-driven strategic business approach is essential to optimize a timely ROI from any CRM programme**



# THE KEY ELEMENTS OF THE TARRYSTONE APPROACH

In any CRM programme there are five broad principles that should be considered:-

**1. Board Driven**

A well implemented and comprehensive CRM programme impacts on the skills, attitude and approach of people in all parts of the organisation and the business processes they use. There are investment decisions to be made as part of the overall financial planning of the company. To succeed it must be strongly driven from the Board down, with project 'owners' throughout the organisation.

**2. Short Term Wins**

Full realisation of potential within the overall strategy may be long term yet short term wins should be identified to deliver within the same financial year they are initiated. This will give confidence in the CRM strategy and help support future investment decisions.

**3. Revenue Gains and Operational Efficiency**

In any CRM project an equal balance is required - how additional revenue can be generated with how good customer service can be provided at optimum cost.

**4. Real Customer Understanding**

The CRM programme must be supported by a clear understanding of the customer. A clear recognition that your customer is faced with a myriad of choice and that you are only as good as your last contact... ***And your customer is rarely that loyal.***

It is important not just to profile and segment customers to determine potential and marketing action, but to understand their attitudes and transactional behaviour and measure the trends in their experience in dealing with your brand.

**5. Intense implementation, strong project management**

CRM is best implemented by a marketing led, cross-company project team involving marketing, sales, customer service (call centre), personnel, training and IT. The vision must be translated in to a hard-nosed financial implementation plan and executed across departmental boundaries with a combination of bridge-building and strong project management

**One Vision, one integrated team with  
many beneficial outcomes**



# THE TARRYSTONE 10 CRM ESSENTIALS

1. Strategy and Return on Investment
2. Understanding your customer
3. Data Management
4. Customer Contact Strategy and Implementation
5. Customer Acquisition
6. Customer Development & Retention
7. Customer Service and the Call Centre
8. Marketing has to change
9. The CRM Organisation
10. Making CRM pay

**TARRYSTONE  
can help you  
realise the benefits  
in every area**

# RETURN ON INVESTMENT

## CRM STRATEGY ROI AND COMPANY BUSINESS PLAN

### Company Vision and Cultural Change

**A**dopting a CRM approach is about a Board's vision of how they wish to run their company.

There is a fundamental belief in the importance of understanding customers in order to acquire more at lower cost, and to maximise retention and customer value. CRM involves embracing new technologies, processes and working practices and the vision has to be translated to all staff in the way customers are serviced.

A commitment to organisational and cultural change is required, therefore, to realise the full benefit of financial investment

### Investment as part of the Business Plan

**T**he investment in cultural change, people development & training; in systems & processes; in sales and marketing should be aimed at both top line revenue gains and cost efficiency.

There is a need for the CRM vision to be translated first in to a strategy and then in to a hard-nosed financial implementation plan and for this to be integrated in to the organisation's overall Business Plan after testing. It should give clear expectations of return on investment over given timescales.

### Investment without full benefit

**O**ften CRM is seen purely as an IT investment to implement a multi-channel contact management platform across the company or simply in a customer service Call Centre. This is potentially a large investment but clear benefits should be seen in improved and more efficient customer service and in centralising data management. However, a financial return is often difficult to justify.

This is because the clear benefits of a CRM approach, particularly top line revenue generation, are not fully addressed at the same time and in an integrated way.



# RETURN ON INVESTMENT

## CRM STRATEGY ROI AND COMPANY BUSINESS PLAN

### Cultural Change and Skills development

An IT investment without an associated investment in people to effect changes in customer service attitude or develop skills for new customer contact initiatives is missing a large benefit from CRM. The best way to keep customers is to be proactive with relevant messages and propositions at relevant times. Your organisation needs to have the people skills and marketing expertise to do this.

### Quick Wins

As part of the overall CRM strategy we would recommend some short term projects of modest investment with quick financial returns. The overall vision may take several years to realise but each financial year needs to see a positive bottom line benefit that encourages the CRM programme forward.

### Modelling and Monitoring

Each CRM initiative needs to be financially modelled and then results need to be monitored against the model constantly, with adjustments along the way. While CRM may be a vision, implementation has to be hard-nosed.

**At TARRYSTONE we help you to achieve  
- full financial benefit from CRM**

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# UNDERSTANDING YOUR CUSTOMER

## What they are not – loyal.

Customers are fickle and their loyalty is very transient. How can you feel loyalty to a large multi-national where the person you speak to is different every time? Loyalty is only expressed in terms of 'what is in for me' and with so much choice available, good reasons to stay have to be provided constantly. Similarly, providing innovative, value for money products supported by a brand recognised for good customer service is vital.

Yet of key importance is to be constantly proactive with the customer -

*to sell more products and services while you have them  
and thereby build inertia against them leaving.*

## What to understand about your customer - Satisfaction

It is difficult to sell additional products and services to an unhappy (or less than impressed) customer. It is important not only to proactively manage the unhappy customer but to get a statistical fix on the level of customer satisfaction - from all potential contact points with the organisation. The trend in any dissatisfaction can then be constantly monitored downwards within a sustainable cost.

Superimposed on this strategy, may be a need to recognise customers with high existing or potential lifetime value and prioritise their customer service treatment accordingly.

## What to understand about your customer - Products

Clearly there is a need to know what a customer has bought from you, the value, the channel, and when. Additional products to sell to clusters of customers need to be defined according to their existing portfolio, when their previous purchases were made and what channel they preferred to use. This may involve identifying and filling product gaps in your offering. It may also involve collecting key pieces of information from customers before you can maximise customer value, target accurately and market cost efficiently. A sales and marketing multi-channel strategy to sell the additional products then needs to be developed.

# UNDERSTANDING YOUR CUSTOMER

## What to understand about your customer - Data Collection

There are many low cost ways to collect profile data on customers beyond their purchase history as a bi-product of other activities.

**For companies using distribution or a retail channel not even basic end user customer information is necessarily immediately available.**

Some examples are –

- at the point of purchase
- through product registration cards
- web registration
- during customer service calls
- during satisfaction surveys
- via a customer section of the web site
- during proactive or reactive sales calls
- face to face meetings
- from promotions and events
- from advertising and dm response

However, the collection of data needs to be **both accurate and consistent** over a long period of time if it is to be there in a quantity that gives meaningful profiling and targeting options. Data collection strategy should be geared precisely to marketing initiatives and sales opportunity.

**Vague data collection on the basis that it may be of use at some point never works in sufficient quantity and dilutes what is important.**

The process can often be speeded up by matching customers to external data but consideration needs to be given to quality, with the relevance and sales value of any data sets compared to the cost of adding them.

Often, customer data is collected in order processing systems without a full appreciation of its value to CRM programmes and future sales. In these circumstances the quality of the basic information is often inadequate (e.g. Poor addressing, no telephone numbers, no e-mail address etc.)

In this situation, matching and enhancement using external data sources may be cost justified.



# UNDERSTANDING YOUR CUSTOMER

## Customer Profiling and Targeting

By the collection of profiling as well as purchase data, clusters of customers can be identified who are best targets for specific additional products and services. Additional segmentation may be required in terms of which channel, or combination of channels, is best used to get the most cost-effective response.

The fineness of the segmentation required depends on the evidence of response. In some cases, basic profile data is sufficient but occasionally this needs to be refined by attitudinal data and /or by previous response / purchase data.

Creating and maintaining a suppression file of 'gone-aways', 'died' 'do not contact' 'customer service issue' etc to be used in all initiatives is important to improve response rates and avoid customer service issues

**The timing of initiatives is often more important than very refined profiling.**

Some products and services have a strong seasonality factor, some products have regular renewal dates, some products have a reasonably well defined life-cycle. Gathering data on expected purchase timings or making an educated guess is often an important element in generating additional business cost-efficiently.

## Learning from customer actions

Monitoring the response, orders, sales value and cost of sale from marketing initiatives to customers is clearly important. Learning about the profile of customers that respond and convert is obviously best done from actual results and becomes key once there is a history of campaigns to draw on.

This may then influence adjustments to the profile data being collected.



# DATA MANAGEMENT

## Data Processes

There are essentially 4 types of customer data that can be collected –

1. **Profile**
2. **Attitudinal**
3. **Contact**
4. **Transactional.**

The collection of data with consistency and accuracy is hard work so a clear strategy needs to be in place on how **data is to be used to generate additional business** so there is a clear focus on the appropriate data collection.

Once the customer data required to drive the CRM programme has been decided, the method of gathering it and then keeping it updated needs to be agreed with cost a predominant factor. This will often involve several sources and rely on people across the organisation to recognise its importance and do the job consistently well. This will then need to be supported by regular updating processes and routines where data from several sources are brought together.

These processes obviously need to include the regular addition of new customers and the loss of customers where this is a known fact (or a set of parameters assumes this to be the case.) An important consideration is whether data is collected 'in real time' or collected in a batched way at set intervals.

Contact data is collected in real time and tends to act as a suppression to proactive initiatives (*e.g. where a customer has a current issue or has just enquired about the product about to be promoted*)

However to hold contact data alongside transactional and profile data in one all embracing customer platform means expensive system implementation and TARRYSTONE can often advise on some less than 100% but cheaper alternatives which can be sometimes the best approach.



# DATA MANAGEMENT

## Data Enhancement

Customer data being extracted from historic transactional order processing systems may need enhancement in quality before proactive campaigns can be successfully undertaken (see 'understanding your customer')  
Improvements to the transactional system together with re-training of staff to stop this being a continuing problem should be implemented where necessary.

## Data Warehousing

Once data gathering processes have been established a repository is required so that customer centric records involving all types of data can be held. This system needs to be carefully specified so that it is consistent with the data strategy but nevertheless flexible to be modified / added to at reasonable cost to support a developing CRM strategy.

## Data for Marketers

Query and analysis tools need to be in place alongside the data warehouse so that the Marketing Department (rather than the IT Department) is in a position to manage and understand the data and through queries and reports know exactly what is available to support campaigns. Good CRM strategy and successful campaigns come from a thorough understanding of customer data not from an arms length conceptual approach.

## Campaign Management

Once customer campaigns have been initiated, the fact that a customer has been selected for a particular campaign and the outcome (if any) needs to be added to the customer record.

The results of campaigns then need to be included in future selections as part of the overall customer contact strategy.

This can be both positive and negative where the information is used to suppress a record from further campaigns or to positively select a record for a campaign.



# CUSTOMER CONTACT STRATEGY AND IMPLEMENTATION

## Taking the Customers Prospective

**A** contact strategy needs to be decided for different segments of customers according to the sales potential offered. Within this, it may be considered that some customers do not justify any proactive contact at all. But a clear part of the strategy needs to be how the customer is likely to react not simply the potential they have to you.

The customer needs to hear from you with relevant and well timed propositions frequently enough to keep your organisation top of mind but not too often as to make the customer turn off to the constant bombardment.

**S**ome channels of communication are less intrusive than others so can be used more frequently. For example, you need to decide how often an outbound sales call can be made to a customer before it becomes too intrusive compared to a mailing or e-mail.

## Customer Profiling by Communication Channel

**N**ew e-based technology needs to be empowered and integrated in with more traditional contact methods. Consideration needs to be given to what is known about the customers preferred channel either by information gathering or from practical experience.

Combinations of more than one channel while more expensive often, after test, are found to offer better cost per sale

## Consistency of brand and message

**I**f the customer is to receive a combination of propositions through one or several channels over a period of time then there needs to be a consistent creative approach and message across all channels including e-media.

This also needs to be reflected in the tone of voice and the verbal message if the phone is to be used.



# CUSTOMER CONTACT STRATEGY AND IMPLEMENTATION

## Integrating Reactive Customer Contact

A customer contact strategy should not be just about proactive initiatives. While it is not known precisely when a customer may take the initiative, consideration needs to be given to what can be gained from an in-coming contact both in terms of immediate business but if this is not possible or infrequent, in terms of information. **Too often customer service is doing a good job but so much more could be achieved if the horizons are extended.**

To achieve this there needs to be immediate access to customer information when they make contact and a clear strategy for what is said to which groups of customers in what circumstances.

## Skill Sets

Opportunities to develop more business with customers should not be restricted by the skill sets of staff but they often are.

Gradual changes in culture with the acquisition of new skill sets, while not easy to achieve, can lead to substantial opportunities for incremental business

## Customer Contact History

From the above, it can be seen that there is a lot of potential to communicate with customers both proactively and reactively. In these circumstances, an organisation can move from very little customer contact to a lot with the customers with most potential receiving perhaps too many communications.

With this in mind, a customer campaign history needs to be maintained and monitored so they are not selected for too many campaigns too often.



# CUSTOMER ACQUISITION

## Customer Acquisition and CRM

While customer acquisition is clearly a subject in its own right and some may argue not part of a CRM implementation we believe that the whole acquisition and customer management process should be seen as one continuous spectrum to gain maximum benefit all round

## Customer Profiling

By understanding the profile of customers who have bought certain products through certain channels, prospect data can be sought with a similar profile to refine and make more cost-effective future customer acquisition activity.

## Customer and Lost-Customer Research

By researching a customer's and unconverted prospects' experience of the sales process lessons can be learnt to improve the buying experience and hence the conversion. This needs to be reviewed as the combination of communication channels that the customer can potentially use increases.

## Use New Channels Effectively

A company will by definition have a lot of track history and data on the effectiveness of their traditional channels to gaining a customer, how best to use that channel and at what cost. This does not necessarily mean that all traditional channels are being used well or in the right combination. The availability of new technologies adds to the options and combinations, with less known about how to work the new channels for best impact. Pilot testing and Customer Research is a key element in developing the best approach.

## The Role of the Sales Force.

Customer value analysis and segmentation can give focus to sales force priorities and potentially leave more time for prospecting.

**TARRYSTONE can help you  
gain more customers, more cost-efficiently**

# CUSTOMER DEVELOPMENT AND RETENTION

## Setting the Strategy and Product / Service Boundaries

The argument that it is more cost-efficient to sell an extra product or service to an existing customer than to acquire a new customer is generally true so long as there is an understanding as to how far the brand will 'stretch' in the mind of the customer.

**Clearly, the company also needs to determine which markets it wants to be in taking in to account market share and revenues against competition, margins, and the ability to service the product portfolio cost-effectively.**

In some cases, the customer would expect a certain product to be within the stable but the company sees limited value in it. Alternatively, the company may have gaps in their product portfolio which the customer sees as a logical extension and product development / sourcing is a key element in the CRM strategy.

## The Sales / Marketing Mix

Not all companies have a field sales force but most do especially in the B2B sector. To the salesman there is only one relationship the customer should have and that is with them. However, often too many customers have been built up over the years for the sales force to have sufficient resource to service and develop them all effectively. Customers and business opportunity are lost.

A prioritisation of accounts and a servicing and development strategy combining field sales with internal sales and direct marketing is often the best way to maximise customer development while giving the sales force sufficient time to focus on key accounts and customer acquisition.

Because of historic organisation structure, 'politics' and personalities, the best CRM /customer acquisition strategy is not always implemented in this scenario.



# CUSTOMER DEVELOPMENT AND RETENTION

## Customer Segmentation and Development

Customer segmentation needs to take place in terms of selling additional products and services to the most likely customers through the channel where they are likely to be most responsive. The better the segmentation the more cost efficient the customer development campaign is likely to be. This requires an understanding of the key triggers in a buying process and how the careful collection of profile, interest and timing data in a cost-efficient way can help the process.

## Skill Sets

If maximum opportunity to develop customers is to be realised, managing the customer relationship has to be seen by all involved as part of a selling process.

In this scenario not only do customer questions and service issues need to be dealt with effectively and with skill but this needs to be extended to the collection of key pieces of information and in some cases in to (straight forward) sales.

**In a lot of cases this involves a cultural change leading to staff buying in to a change of skills to a degree outside of their current remit.**

This is not an easy process and takes an experienced structured approach over a period of time.

## Pilot projects, and Reporting

As with acquisition, customer development campaigns have many variables - data selection, product proposition, channel, creative execution and process to name but a few. Testing with tight accurate results reporting on a scale that is as low cost as possible while being representative is key to success.

**TARRYSTONE can help with your cross-selling  
and up-selling strategy**

# CUSTOMER RETENTION

## Lost Customer Research

It is important to understand why and when customers leave to develop a corrective action programme to improve retention.

The issues may in part be to do with product offering and competitiveness and / or with the quality of customer service being offered and can be unduly influenced by market volatility

## Customer Service and Rescue Strategies

Improving customer service helps, usually achieved by empowering staff with responsibility, knowledge and access to information while having sufficient resource to meet demand, all at an affordable cost. The increase of customer communication channels adds to the complexity but there is the potential for lower cost customer service too.

*If a customer needs to get in contact in order to 'cancel' then there is an opportunity to rescue the situation if staff generally or specific staff are trained to 're-sell' rather than simply accept the loss as an administrative exercise.*

## Customer Value and Customer Vulnerability

It is not cost-efficient to try and save every customer - some *churn* is inevitable  
*Indeed some customers permanently shop around whatever you do.*

As part of a retention strategy customers need to be profiled by their potential lifetime value. So different strategies and expenditure limits can be set to save certain customer groups or make them less vulnerable.

Segmenting customers for different retention strategies is equally as important as the segmentation for development strategies.

## Customer loyalty schemes as retention mechanisms

Generally the more product a customer has bought from you the less likely they are to leave. Especially if the nature of the product has some inherent inertia associated with it - *e.g. transferring a bank account*

A strong proactive development programme with many positive contacts not only adds value to the worth of a customer but helps the retention.

Reward schemes can also assist retention as long as the customer sees it as straight forward and of real value compared to competition.

This always assumes a constant good customer service experience.

Achieving this at a worthwhile cost is often difficult.

**TARRYSTONE helps Customer Retention**

TARRYSTONE



# CUSTOMER SERVICE AND THE CALL CENTRE

## Customer Focused Culture and Skills

Staff in a Call Centre can do so much to add value to a customers' brand experience by having a positive, upbeat attitude, and a helpful disposition. This can be partially achieved by formal training but more by on-going supervision, call monitoring and coaching undertaken by **first line supervision and management that is trained and motivated to really drive home the CRM culture.**

## Supporting Customer Centric Systems

No matter how good a CSR is in the call centre if they cannot help the customer in a 'one-call solution' the customer is unlikely to be happy. This means a level of trained knowledge combined with access to all relevant customer information with empowerment and responsibility to make decisions within controlled limits.

**A solution in one call making the customer happy is also more cost-efficient for the business.**

Bringing this together culturally and systems-wise is often where the major CRM investment takes place and to justify it purely on customer service and efficiency grounds is usually difficult.

*However, as part of a total CRM strategy involving significant revenue gains the argument is more appealing.*

## Resourcing

No matter how good the people and supporting systems, the customer is not going to be happy if they cannot get through in a reasonable time. It is important therefore that there is sufficient staff, with maximum working hours flexibility, to provide the level of service through the working week. There is clearly a pay-off between cost and service where a degree of compromise is inevitable.

The business needs to decide what service levels at what cost and monitor themselves constantly looking for improvements along the way.



# CUSTOMER SERVICE AND THE CALL CENTRE

## The Customer's Experience

It is important to track trends in customer satisfaction with the level of service being provided and not just assume that if service levels are there or thereabouts everything is okay.

Often, it is the 'top to tail' contact experience that causes dissatisfaction with the poor use of technology designed to improve the customer service experience at the route of the problem - *poor and too infrequently changed messaging, poor routing, inadequate checks on all routing options*

## Turning a Cost Centre in to a Profit Centre

Most Customer Service Call Centres have the issue of how to provide the best service at the lowest cost. However, steps can be taken allowing the call centre to start to generate revenue streams.

The 4 most common ways of doing this are –

1. Premium customer service or technical support paid for by the customer as part of a top of range product
2. Through premium rate lines offering additional support or specialised information
3. Through the collection of information that feeds a subsequent sales process
4. From a sale made at the back end of a service / support call

This requires a careful structured execution over a period of time with significant changes to culture and skill sets but it can be done.

**TARRYSTONE can help move your cost centre  
towards a profit centre**

# MARKETING HAS TO CHANGE

## Marketing has to change

**N**owhere does CRM impinge more than in the Marketing function. It is here that most of the opportunities can be realised to build customer value and additional revenue streams.

The proliferation of potential channels leads to three fundamental changes in marketing thinking.

- Firstly the need to recognise the brand across every channel means a tightening of the corporate identity.
- Secondly the need to create an over spanning creative communication umbrella which transcends all media.
- Thirdly the need to consider the most effective integrated combination of channels

**T**his in turn changes the role of the various media. The TARRYSTONE approach is to develop a media & message appreciation of all the channels and their future respective roles and costs. The advancement of digital content and the ability to deliver customised messages cheaply and quickly means new ways of delivery and must change the way each media & channel is used and developed.

## Digital Asset Management

**W**e can advise and implement the digital asset management and content to integrate into your CRM programme. These developments have been technically driven and in the main ignored by the marketing community. TARRYSTONE can help in the re-briefing of the agencies and internal teams in the new communication strategy and channels.

## New ways to plan

**I**n planning terms there is a need not to think in overall year plan of campaigns but to start to be customer event driven. Thus Marketing has to pre-plan its response to known events. By using our experience we can help gainsay the outcomes of the CRM data and start to achieve the all important quick wins.

**F**inally we can help with re-structuring with Customer Segment Managers and new communication needs building internal capabilities.

# THE CRM ORGANISATION

## Board Driven, across the Company implementation

We have set out to show the implementation of CRM to achieve maximum financial benefit from customers requires the involvement of all parts of the organisation, with projects often crossing department boundaries. We have highlighted the need for cultural change and the overall financial implications. We have done this because we know fundamentally that a CRM implementation needs to be Board driven with the buy-in of all department heads and senior managers. CRM cannot be executed by one part of the company in isolation because the customer does not see it that way and most projects cannot be executed that way.

## Creating the drive, Creating the glue

The complexity of projects demands the potential involvement of a lot of staff, all working together with common purpose and vision. The degree of cultural change and re-training means CRM projects need a lot of corporate drive to see them through to success. Any initiative will need key project champions throughout the organisation, and ownership and drive at board level.

Strong management is essential. TARRYSTONE contributes with good project management processes in place and an ability to bridge the 'politics' and historic gaps between departments.

## Using External Suppliers

Setting up CRM projects and re-training staff is expensive and means a difficult decision to take in the absence of any concrete evidence that a good ROI is possible. That is why TARRYSTONE can, in some circumstances, use external suppliers to undertake controlled tests, This is particularly effective with proactive campaigns which, although done in isolation, can provide the evidence needed to underpin the wisdom of a CRM strategy.



# **MAKING CRM PAY**

## **A SUMMARY OF THE TARRYSTONE WAY**

- 1. Have a clear strategy and financial plan for CRM as part of the overall Business Plan**
- 2. Have short term wins as part of the longer term vision**
- 3. Focus on revenue gains as well as cost efficiencies**
- 4. Look to turn cost centres in to profit centres**
- 5. Drive from the Board down with buy-in across the whole business**
- 6. Implement with management intensity via an integrated inter-departmental approach**
- 7. Truly understand your customer's attitudes and experience from research and data**
- 8. Develop specific Marketing and Sales activity with CRM as the starting point**
- 9. Invest in CRM systems and cultural change only to the degree that is necessary to achieve financial objectives**
- 10. Use pilot work internally or externally to validate CRM business models. Monitor vigorously and regular report back to the Board**

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