

WHITE PAPER

The role of CRM in integrated customer service management



Introduction

When you think about CRM, do you think first (and often only) of one department in your company? For instance, some companies use CRM for sales management and/or to handle marketing campaigns and market segmentation. Others use it for knowledge management. And some companies use CRM in the customer support department providing service management.

But the role of CRM can be more than just a tool for sales force automation, marketing or customer support. In fact, CRM can help you automate your business processes and integrate every client-facing department with your service organization, resulting in increased customer satisfaction, long-term relationships and increased sales.

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A broader view of CRM brings more value

To ensure greater benefits and results from your CRM solution, you need to put it to work supporting operations and cross-business processes. Since the heart of any CRM application is your customer data, other systems that store the same customer information would be a good candidate for integrating with your CRM. Doing this, in turn, offers you the opportunity to rethink and retool existing operational mechanisms.

Viewing CRM from a more holistic perspective can of course trigger a cultural change in the way your business positions and uses services in the management of customer relationships. As you more tightly integrate the role of CRM and, in particular, its relationship to service management to better meet your customer needs, it becomes more crucial to your business.

Challenges and advantages of tighter integration

Taking a more integrated approach to how you use your CRM solution brings clear business advantages because you use one platform to provide one common data set. That means different departments can work off the same data set and the content is consistent. This consistency will enable you to better service your customers, especially in a today's multi-channel environment where full visibility of a customer's profile ensures that each conversation doesn't begin from scratch.

Customer loyalty and retention increases when you're able to service them more quickly and efficiently. Therefore the value of your CRM solution becomes obvious: a reduction in selling costs. And if the percentage of retained customers rises by ten percent, then the increase in revenue will be easy to measure.

Of course there are challenges that must be dealt with along the integration path. All too often different departments don't communicate or discuss ways to optimize data that comes in from one entry point. For example say your organization uses CRM for sales and customer account management. Have you considered using it for the service side too?

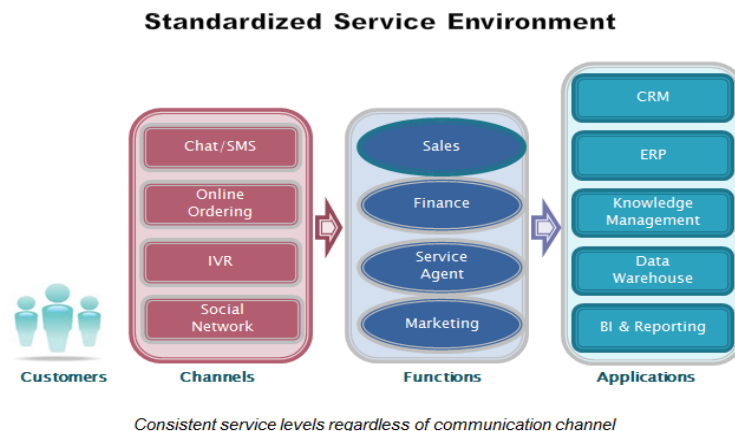
In most cases, service management is already a part of your greater CRM package. When you buy a license, the service management piece is there; it's just not always used. Step back and take a more holistic view across your different departments and you will likely see how you can make greater use of the service management module by effectively integrating it across disciplines and into other systems and

with external tools, such as ERP for invoice management and billing, as well as third-party systems that are handling phone and subscription services.

This will provide your customer support agent with all the information needed to offer quality service to the person who just contacted you through their preferred channel, including phone, email, web, text, live chat, Facebook or Twitter.

In short, you can more effectively use CRM to deliver a truly integrated service management experience. And different customer communications that are managed by separate parts of the business can come together with the appropriate levels of transparency between them.

Integrating CRM and service management also provides you with a new set of marketing, finance, operations and other reports that give you a wider, clearer window into cross-departmental activities. So you can respond more quickly and effectively to issues you might have missed before, and make business and strategic decisions with greater clarity and quicker impact on your overall business success.



Smart steps on the way to successful integration

As you consider the best ways to create a more integrated approach to customer service management, keep these key steps in mind:

Define the problem and business processes to help you achieve your end goal. Before you move ahead to integrate CRM and service management, define the business processes around how you want departments to interact. Map it out. As different departments begin looking into the data within

your CRM application, you should properly define best use cases so all are using the data in the appropriate and intended way across all departments.

Make sure you have executive support. It is always wise to have senior management buy in to your integrated approach. Take the time to secure support for your chosen direction and plan from the top down, and then leverage that sponsorship to roll out your initiative across departments.

Train your users. If your approach to integrated CRM and service management is not easy to use, or it connects through an interface that is not intuitive, employees probably won't use it – at least not to its maximum capability. So be sure to provide adequate time and resources for training.

Know when this approach is right—and when it isn't

When it comes to deciding to what extent integrated service management is the right CRM approach for your business, it's not so much the size of the company as the type of business that matters most.

Factor in your customer base and the type of product or service you are selling. Even if you are a company with a smaller customer base, if your business is customer-support intensive you will benefit from an integrated service management approach. You can automate your customer support process and, in turn, reduce the amount of time agents are on the phone with a customer while increasing first call resolution rates.

On the other hand, if your customer support interactions stay consistently at a low volume, you need not embark on this integration effort because the ROI just isn't there.

To help you decide which approach is right for your company consider partnering with an experienced serviced provider – one with a proven track record in integrating CRM and service management. They can make recommendations attuned to your business needs and service environment.

Three examples: how integrated CRM improved service management

What worked for a technical support provider. The company is a leading provider of remote service and technical support for consumers, home office users and small businesses in the U.S. Its industry-certified agents deliver online support for all technologies, including PCs, Macs, Smartphone

devices, netbooks, MP3 players, network devices, printers and digital cameras. Business partners include major service providers, retailers and hardware and software manufacturers.

In order to efficiently manage customer support activities for one of its partners the company needed a CRM system. Its choice was a customized, integrated NetSuite solution. Now customer records and cases are created dynamically in NetSuite using SuiteTalk, and both sets of records include customized fields. Also part of the solution: The logic for closing a case by adding filters, notes and work time for each support technician, quote and status.

The solution helps the company deliver rapid, transparent and quality customer support services to its partner. Personalized support has helped strengthen the business relationship between the two firms.

What worked for an online file backup service provider. A start-up company that provides online backup solutions for file storage and protection needed a CRM solution to deliver better service management of subscription plans, integrated payment processes and accurate reporting. The company needed a website that would serve as a marketing interface and portal for customers' data, a unique customized application, and a backend CRM solution for service management and reporting.

First the process flow was analyzed and customized. Then NetSuite was implemented to handle the business processes; and a unique Facebook-dedicated application was developed to enable file access to customers via the social network. The new website and customized application serve as single point of communication, and both are integrated with NetSuite to meet all of the service management and backend reporting requirements, from subscription plans to invoicing and payments.

This CRM integration helped the company deliver faster services to its subscribers, improved customer satisfaction, and led to a more efficient internal reporting process. What's more, the innovative Facebook integration solution opened access to a large pool of potential clients.

What worked for a web-coding services company. Business had been increasing exponentially for this small company and they soon found themselves with disconnected workflows and dispersed customer data, which was affecting client satisfaction. The order process had become lengthy because it engaged different tools and people at every stage. What's more, the lack of a centralized customer database meant the company could not accurately track customer interactions, project status, order changes or billing details. The company needed to automate its order processes and improve workflow in order to deliver the best turnaround time and improve customer service.

The solution was a customized Microsoft Dynamics CRM to integrate the company's order processes with its project management activities. Automated triggers were created to align specific actions that must be taken throughout the project management process. Online ordering and billing components, such as the company's website order form and payment portals, were integrated with the CRM, ensuring client data is captured properly. And an automated payment notification process was integrated with the payment portal to notify clients about project status and remind them about payments.

By automating its critical processes via Microsoft Dynamics CRM, the company has reduced project delivery times, improved its ability to track project details and increased customer satisfaction substantially.

Summary

Simply put, if connecting CRM into a more integrated approach to service management enables you to:

- Improve agent productivity
- Better service your customers
- Integrate social channels
- Increase upsell opportunities
- Reduce service costs
- Decrease the amount of time spent with customers and prospects

....then it's the right way for your business to go.

It's good news for you – offering a new way to drive down costs while maximizing your existing CRM investments. And it's and good news for your customers and prospects because you'll be delivering the level of service they expect and deserve.

About the author

OSF Global Services (www.osf-global.com) has been delivering SLA-grade professional services since 2003, having established itself as a trusted advisor and technology integrator to clients in 17 countries. The company's forte is application development and technology integration across key markets, including CRM, Ecommerce and Cloud. Headquartered in Quebec, Canada, OSF has offices in the U.S., Romania and Ukraine. This mix of onshore and offshore expertise offers comprehensive, follow-the-sun support

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