

# WORKING TOGETHER

**CRM can seem overwhelming. But it doesn't have to be. Begin by asking: How do we ready our organization for CRM? How do we work effectively with outside partners? Read on to learn more.**

Delivering a successful CRM project depends upon building a successful team, the most important component of which is the core team. The core team usually consists of 8–12 employees for whom the CRM project is a full-time job. Though supplemented by additional internal and external resources, the core team is the group that will live through the project and provide the resources that will be able to execute the methods, processes and technologies that will be the project's results.

## Building the Core Team

The make-up of the core team is critical. The team's membership needs to provide three key characteristics – organizational breadth, functional breadth, and resilience. The need for organizational breadth is perhaps the most obvious need. While a CRM project must take care not to spread its efforts too thin, the project has to be more than a simple sales force automation (SFA) implementation or a customer value segmentation exercise. Organization breadth gives the team the knowledge and the relationships needed to bridge the marketing, sales and service silos.

Functional breadth provides the subject matter expertise to design and implement the new CRM strategies, processes and technologies.

## What skills are required?

Four key requirements are needed to build profitable customer relationships (see figure on page 11).

- **Designing customer strategies** – Building strategies to attract, win and grow customers.
- **Building enabling technologies** – Developing and implementing the technology platforms for delivering compelling customer experiences.
- **Developing customer experiences** – Designing meaningful customer experiences that provide coherent interactions across multiple customer touch points.
- **Measuring the results** – Developing and executing measurement processes to track the business value and provide insight to drive continuous improvement.

Matrixed against these requirements are the skills required for implementations in the customer-facing organization – marketing, sales, and customer service. It is rare for any company to be able to field an internal team with expertise in all of these skill areas. Partnering with external experts is a common solution to this problem. External partners can provide

key skills not resident within the core team, or the expertise needed to coach and develop less-experienced internal resources.

The third of the key characteristics, resilience, is the least obvious needed by the core team. Yet, for many CRM projects, especially those trying to drive significant change in a resistant organization, the ability to keep moving forward after an intense pilot or Phase 1 implementation is the most difficult challenge. Here, too, external partners can provide the core team with help. Partners can provide supplemental resources, the “fresh troops” needed to push a difficult implementation “over the top.” Partners should also provide an experienced perspective – the ability to identify “land mines” and providing techniques for avoiding them; and, most importantly, the foresight to look ahead to the next phase.

## Building the Extended Team

The requirement for functional breadth is the first thing that drives the core team to reach out for external help. The need for additional resources to meet peak project staffing levels, especially in phases heavy with technology implementation, is often the second reason that an external firm is engaged. Once the decision to supplement

the core team is taken, the question of sourcing arises – which is better, a large multi-disciplinary firm or a series of smaller, focused, best-of-breed consultancies?

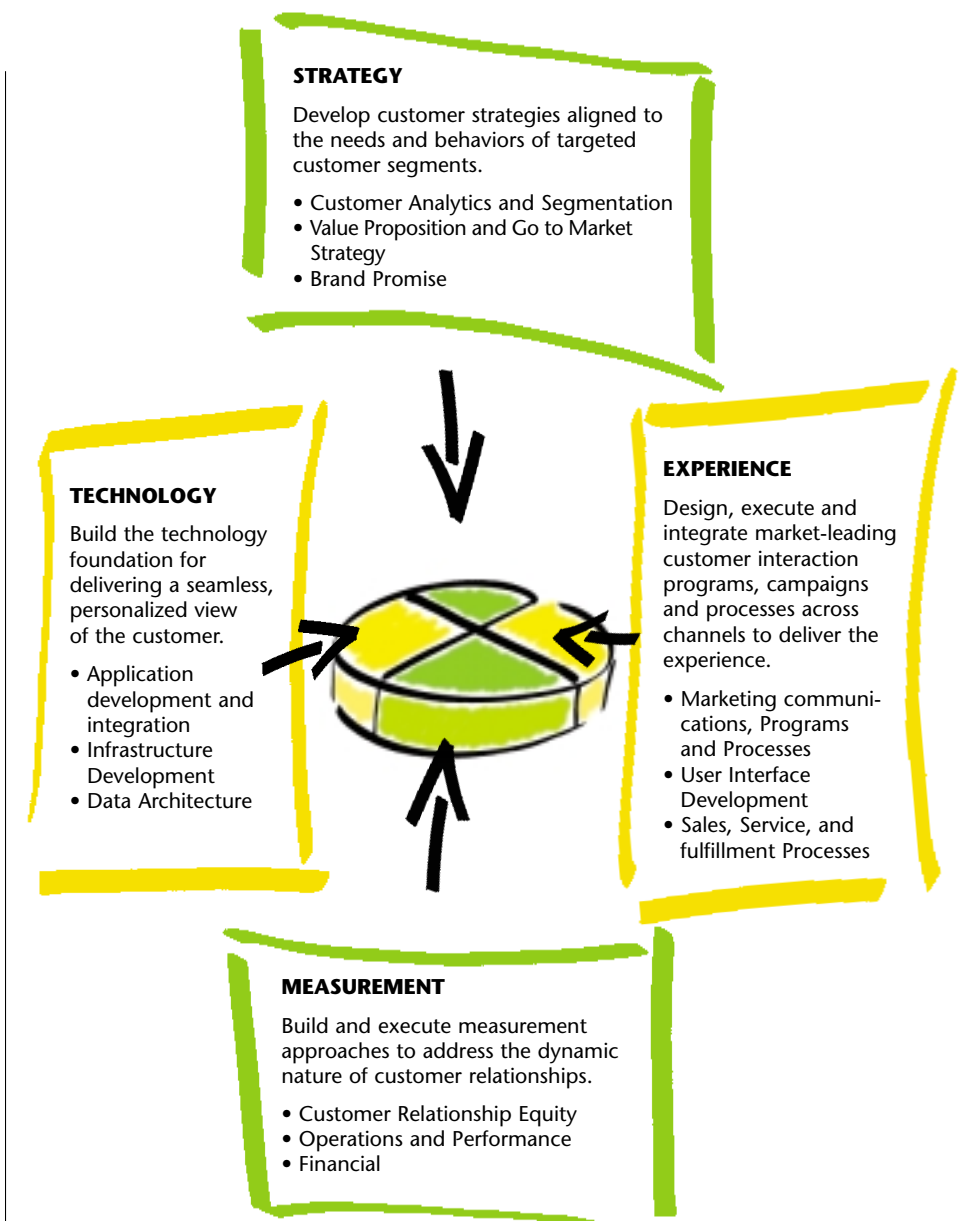
Unfortunately, the best answer is: both. Though many say they can, no single firm can provide deep expertise across all the dimensions of customer relationships – marketing, sales, service, branding, segmentation, strategy, technology, metrics. However, very few core teams have the capability to play general contractor, to develop a single-project methodology and then integrate into it a half-dozen best-of-breed firms.

## The importance of an integrated network

A common compromise is to break up the effort into a series of functional sub-phases, retaining firms with the necessary expertise to assist with specific sub-phases, and then having the core team maintain overall alignment and integration among the sub-phases.

Unfortunately, most core teams do not possess the project management skills necessary to coordinate, on the fly, the smooth integration of multiple sub-phases. The usual result of this approach is a series of separate initiatives, made generally aware of one another via monthly executive steering committee meetings, which are then more or less bashed together by a separate “integration” initiative at the last minute.

There is beginning to emerge, however, a different model. This new model can be called an integration network, a pre-established partnership of best-of-breed firms that integrates the delivery of its individual offerings through a single project methodology, and pro-



The 4 key requirements needed to architect profitable customer relationships.

vides a single project team through pre-set rules of engagement. This is very different from the standard practice of a large integration firm subcontracting a piece of the project to a small specialty firm. Rather than the traditional one-off prime contractor/subcontractor relationship, the members of the integration network come together as a practiced team – a team of highly talented specialists that, having worked together before, knows each member's strengths and weaknesses, and has a clear game plan, the single integrated project methodology. The core team gains the benefit of deep functional

expertise without having to pay the integration costs.

## Conclusion

CRM requires working together both internally as an organization, and externally with partners. A prerequisite for successful CRM design and implementation is senior management's support. This, together with the right core team, ensures company-wide support for CRM initiatives across different units. Where the best solutions require working with outside companies to implement solutions, close integration helps ensure a successful outcome. 