



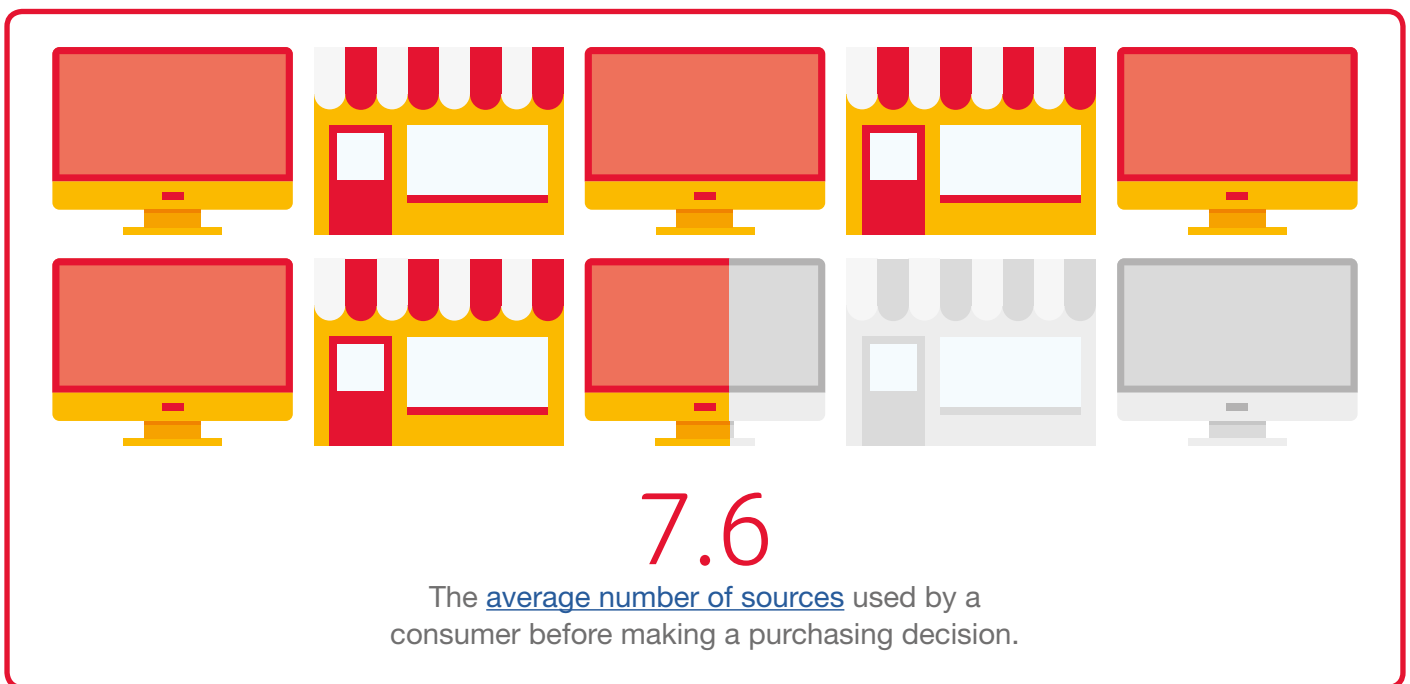
# The Ultimate Guide to: Creating customer centricity with CRM

To prosper in the modern marketplace, companies must embrace a culture of customer centricity – and the best way they can achieve this is by fully exploiting the potential of their CRM platform.



# The Ultimate Guide to: Creating customer centricity with CRM

Customers now demand more from the companies they do business with. Whether it's the B2C or B2B sector, customers expect to be treated as if they are the centre of your world and not merely an entry in an end-of-month sales report. They expect to enjoy support and relevant content however they choose to engage with your company whether it's online or in-store:



Savvy companies have been waking up to this shifting mindset and are embracing a customer-centric approach to their work culture. It means that wherever the customer is on their journey, everyone in the company is there to support, help and enthuse. From Apple to Burberry, customer-centric businesses present themselves as a customer-focused omni-channel that helps nurture consumer buying decisions at every stage of the sales funnel.

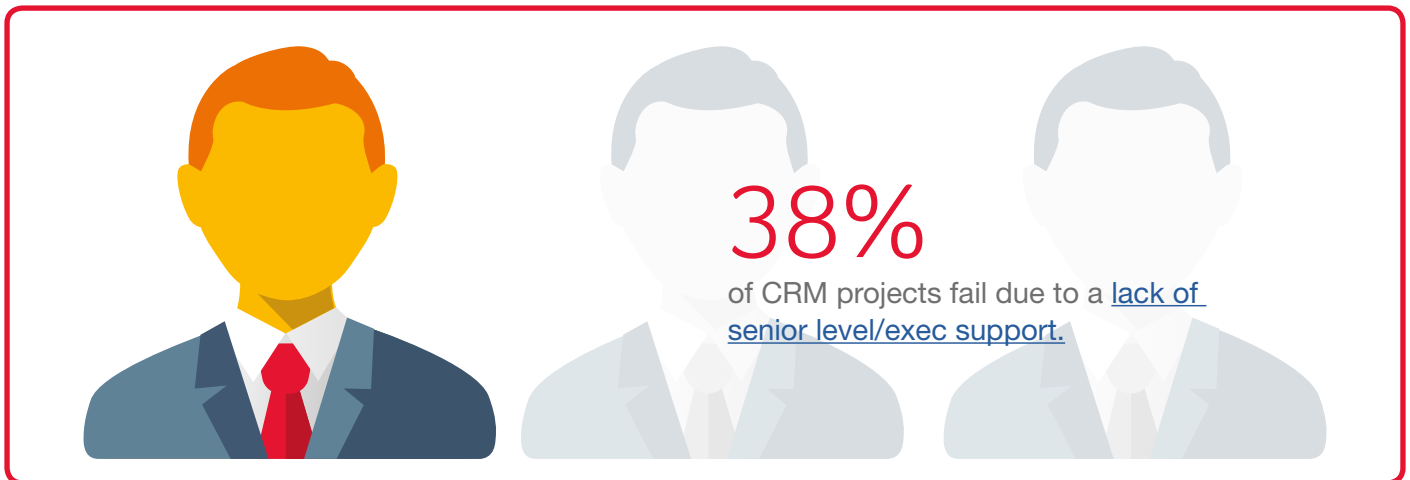
The key ally in this transition to a customer centric culture is CRM. But on its own, a CRM platform is not enough – it requires buy-in from all in your company to ensure you put the customer at the heart of everything you do.

# The First Steps

To start on this journey towards customer centricity, it is essential that every person in the business from the executive level through to the departmental assistants sign up to the new customer-focused vision – and to the CRM platform itself:

## 1. The Board

While the C-Suite may have green lit the CRM rollout in the first place, its involvement is far from over – the board must get behind it for the long term. Without execs buying into CRM and extolling its virtues to all departments and employees, research has shown that any CRM investment is put at risk:




Perhaps this shouldn't be surprising – after all, if lower-level employees see that the board has no interest in the CRM platform, why should they bother themselves? All key department heads and board members must present a united front and act as advocates for the platform. To make this process more efficient, appoint a CRM 'figurehead'.

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## 2. The Executive Sponsor

It is essential that a C-Suite member becomes the official CRM sponsor, leading the charge to promote it across the company. This individual must take accountability for the project, expect and deal with regular updates from the CRM team, set priorities, listen to feedback from staff and ensure that the board's sponsorship is visible to all within the company (see 5. The Employees).



“The executive sponsor must act as your CRM platform’s greatest advocate – especially in the early days when winning over employees to the new platform and transforming the company’s culture into one that focuses on customer centricity”.

### 3. The Core Team

The executive sponsor can't be expected to deal with the every machination of the project; after all, they already have their own existing responsibilities to contend with. To help with the heavy lifting, a core team should be put in place to handle the day-to-day operations of running and maintaining the CRM platform. This could involve hiring new personnel – or training up existing staff – or alternatively, bringing on board CRM consultants to take the strain.

### 4. The Departments

Traditionally, departments have worked in silos, only connecting (if at all) with one another via reports, meetings or corporate events. This siloed mindset is disastrous for a company wanting to become customer-centric. By 'plugging' departments into the same CRM platform though, they will all have access to the same customer data and be able to work together efficiently to create a customer service experience that all can contribute to openly and transparently:



#### Customer Services

...operate at the coalface of the company; the department's ongoing daily interactions with customers can offer vital data and insights for sales and marketing from identifying new customer segments or pains through to highlighting potential issues with products/services.

Complaints can also be turned to a company's advantage if they are acted on efficiently, even feeding into new campaigns or inbound marketing strategies so any issue can be dealt with head-on. And thanks to CRM's reporting abilities, all outcomes can be monitored in real-time to see how well a particular strategy is performing.

### Who Does What?

In an age where the line between the technical and the creative is becoming ever more blurred as big data increasingly takes centre stage, the responsibility of maintaining a CRM platform needs to be shared between both Marketing and IT in unison, and not simply left to be dealt with on an ad hoc basis. After all:



76%

The amount an enterprise will more likely outperform in terms of revenue generation and profitability when the CMO and CIO work well together.



## Human Resources

...is an essential ally in a company's push for customer centricity. While that may seem unlikely due to the department's obvious remit to focus on employees and not consumers, HR can actually play a critical role in generating in-house buy-in for your CRM and company culture transformation plans. The department knows what employees are talking (and complaining) about and is able to highlight which issues should be dealt with to win over employees to the big changes ahead (see Boost Advocacy).

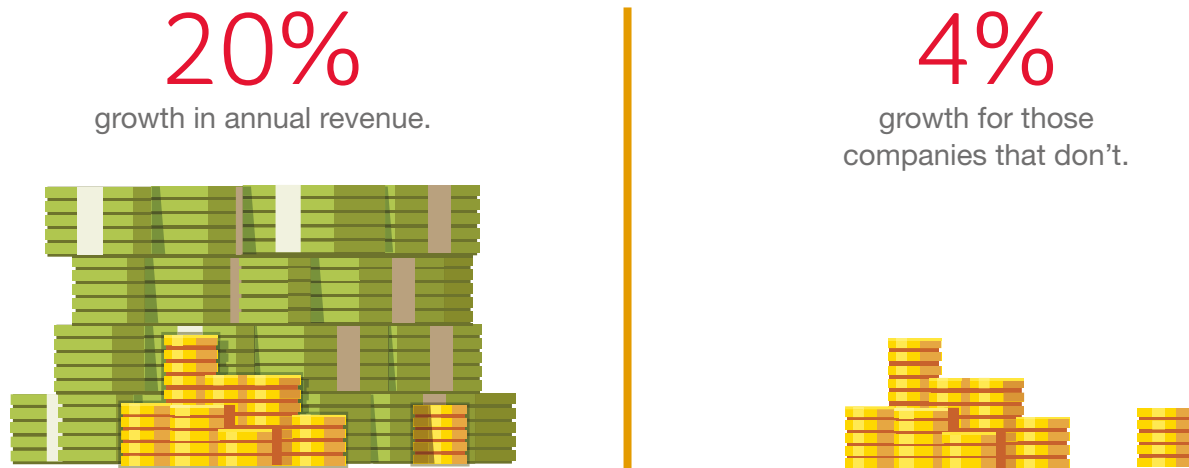


## Sales (Versus) Marketing

...or that's how it can seem within many companies. Sales and Marketing working apart, with Sales wondering what Marketing does for its money while Marketing wonders if Sales is squandering the leads given to it. To break down this counterproductive silo, communication is essential – and again, CRM can help:

- a. It provides the ideal platform for forging a close and transparent relationship between Sales and Marketing.
- b. It can offer real-time reporting and virtual dashboards of critical data that Sales and Marketing can access and work together on.
- c. It helps track customers as they move through the funnel, meaning marketing creates better quality leads while sales knows exactly when to act on them.
- d. It helps identify the key stages of the customer's journey and enables marketing to create content that can be deployed at the right time and in the right format.
- e. It can show how successfully content is engaging with prospects wherever it is deployed, whether it be via social media, in-store or email.
- f. It can help automate the Sales and Marketing process, meaning both departments spend more time communicating with one another rather than being distracted by admin tasks – CRM not only opens up new avenues of communication but critically, keeps them open.

This closer working relationship will see the two department operating in alignment with one another instead of against each other. And in this age, such an approach is critical – after all, research by Aberdeen Research shows that companies who have Sales and Marketing [working in alignment](#) experience:



## Cynical Sales?

Sales teams can be particularly sceptical about the benefits of CRM, some wondering if it is simply a way for management to keep closer tabs on their productivity at best, or at worst, seen as wasteful 'busywork'. It is essential then to highlight the benefits of CRM to your sales people. Think:



Easy-to-search contact information.



Instant access to prospects' social media data.



Creation of automatic forecasting, the ability to automatically set reminders for critical appointments and follow-up calls, automated campaign chasers, and much more.

The list of benefits is far-reaching – [click here for more information.](#)

## 5. The Employees

To win staff over, Sales and Marketing should treat employees as if they are customers, fuelling their enthusiasm for the CRM platform and the move to a customer-centric company culture. Get it right and employees will embrace both, not because they have been told to or are being paid to but because they believe in how vital the new mindset is to serving customers – and to the future success of the company itself.

To win over employees, follow these three steps:



### 1. The Pitch

- Underline why and how the company interacts both internally and externally needs to change.
- Highlight the benefits of CRM to staff; why it should matter to them – from increasing customer satisfaction rates and building loyalty to increasing sales and changing customer behaviour for the better.
- Use your executive sponsor as a figurehead for the CRM campaign so they become the ‘face’ of the CRM platform, selling its virtues while bringing gravitas to the messaging.



### 2. The Benefits

The best way to present this information is via practical ‘real-world’ evidence of CRM’s power:

- Organise hands-on experience workshops and demos where employees are shown the benefits before full training gets underway; get them excited about the platform first so they are more open to learning.
- Deploy delivery formats that are attractive and eye-catching to sell the CRM/customer-centric message; it could involve illustrations representing how customers will interact with the company thanks to CRM or interactive infographics that capture how a customer-centric approach will benefit the company.
- Consider holding events such as webinars with the executive sponsor or preferably with all department heads to show the entire C-Suite is behind the new push; offer the ability for staff to ask questions so their concerns can be answered openly and transparently.



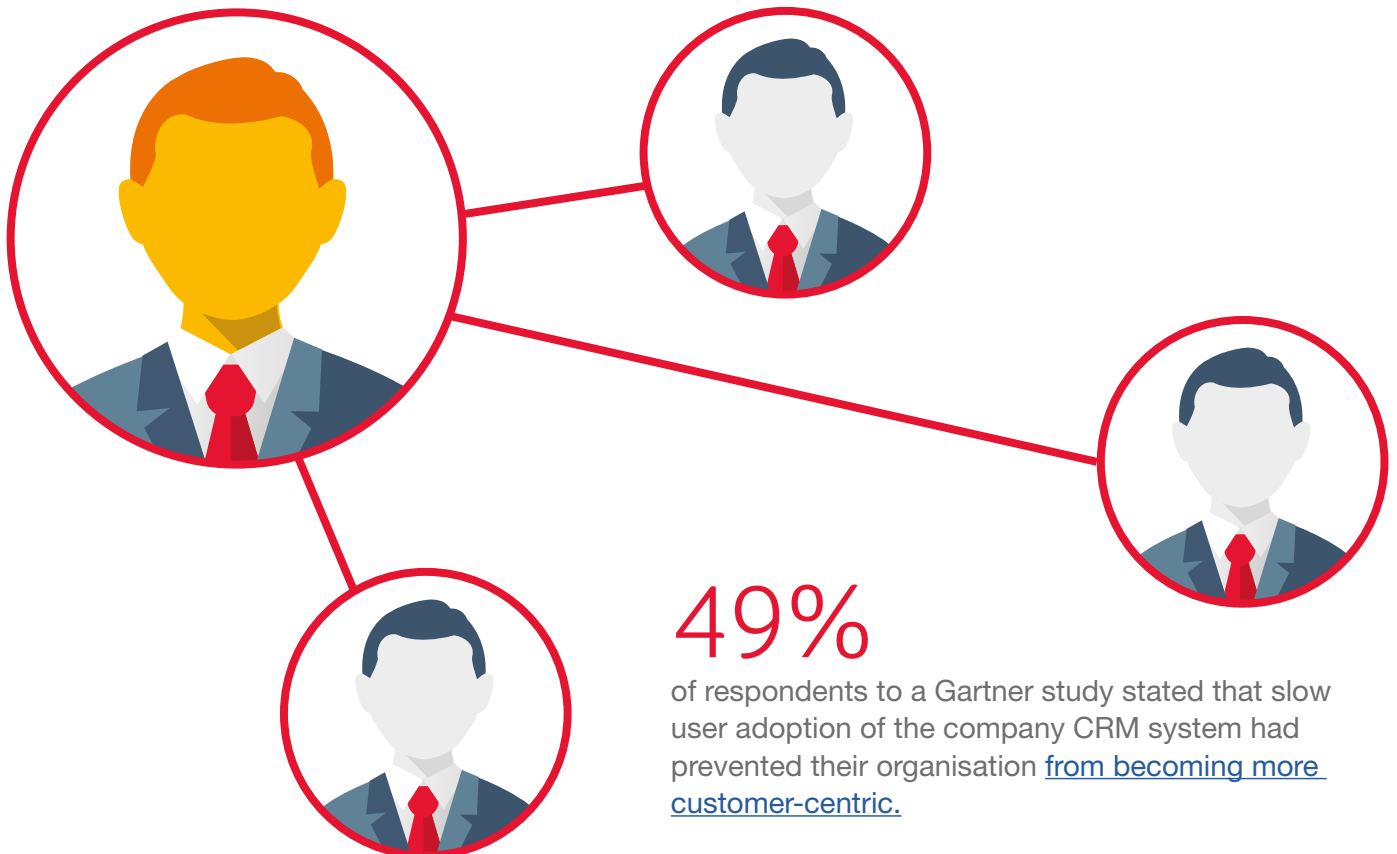


### 3. The Goal

The transformation shouldn't end there – keep employees in the loop as the company moves forward:

- Update them via weekly/monthly newsletter and emails.
- Offer not only ongoing technical training but also soft-skill training including customer service and relationship building.
- Celebrate sales and marketing successes achieved via CRM so all can see its relevance and can share in the success instead of feeling sidelined or uninvolved or worse still, irrelevant to the new process.
- Turn new products/services into an event for employees; consider holding virtual unveilings at a set time to generate in-house buzz.
- Encourage employees to contribute their own ideas, thoughts and more about campaigns via CRM and/or internal social media networks.

These three steps will create the foundations of turning an employee into an advocate for the company's new customer-centric approach. Without their advocacy, your strategy risks failure or a slow uptake that will harm ROI:





# Boost Advocacy

Creating brand advocates within the company will not only ensure the success of your CRM but help push your brand out into employee social feeds whether it be on Facebook, LinkedIn or [glassdoor.com](https://www.glassdoor.com) as they begin to spread the word.

And it's here that Human Resources can play a vital role by helping marketing identify key issues that are important to employees. These insights can be used to create employee-focused content that they will engage with and are more likely to push in their social channels.

## 6. The ROI

To ensure the best possible chance of financial success from your CRM investment and drive for customer centricity, several pragmatic processes should be put in place:

- Targeting consumers effectively based on CRM's real-time feedback data drawn from all customer touchpoints, enabling you to make judgements based on actual behavioural analysis instead of gut instinct.
- Developing personas based on CRM-sourced data and using these as the basis for any marketing and sales strategy – from inbound marketing content and the execution of one-off campaigns to when sales should reach out to prospects and land that sale.
- Ensuring that any data-developed content is made available to customers as and when they need it to aid them in making a purchasing decision.
- Using the above strategies for after-sales customer care to build loyalty and expand the opportunities for up- and cross-selling.
- Creating a seamless experience for the customer wherever they engage with your brand.
- Working with data on a real-time basis to enable you to spot emerging trends and predict future business possibilities.

To ensure you can track ROI on many of these far-reaching elements, [identify and track key metrics](#) and KPIs, and keep the C-Suite regularly up-to-date via reporting. Also highlight any deals that were achieved thanks to CRM and promote them to the board to show the real world practical benefits of a properly deployed CRM platform and a customer-centric approach.



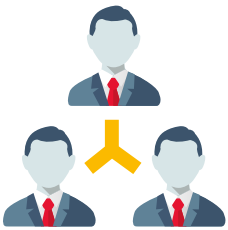
### Keep Listening

Just as important as monitoring metrics is listening to staff and their feedback about CRM; ensuring that any concerns raised by employees about the platform are listened to and if found to be relevant, shown to be acted on. As Redspire's recent and far-reaching report 'What People Really Think About CRM' uncovered, there are serious issues that can cripple a CRM if you don't. In turn, staff disgruntlement to board disillusionment with their investment can threaten your drive for increased customer centricity. For more information, [download the full report for free here.](#)

## Takeaways



Ensure you have buy-in from the board; put a 'figurehead' in place who can act as the primary advocate for your customer-centric push.



Involve all departments in the process; from customer services to human resources, all will have something to contribute.



Treat employees as if they are customers; creating in-house interest and enthusiasm is critical to changing company culture.



Ensure key metrics and targets are put in place; the C-Suite must be convinced that such a seismic shift in company culture can be measured in terms of ROI.

See how Golden Charter improved their level of service thanks to their CRM system.

[Watch the video now](#)

