

# Why CRM Fails-and How to Fix It

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Joan Shapiro Beigh  
 Jorge Sanchez  
 Fanyu Tian  
 Monika Wajda  
 Anna Whitworth  
 TheCaseSolutions.com





# Why CRM Fails-and How to Fix It

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CRM is not a silver bullet. It's a process that requires ongoing investment and change management. It's not a one-time project, it's a continuous effort.

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**John Anwar**  
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### Evolution of CRM

- Three phases in the evolution of CRM:
1. Reporting-Customer Identification  
Asking what happened
  2. Analyzing- Customer Segmentation  
Asking why it happened
  3. Predicting-Customer Prediction  
Asking what will happen

Clearly, the goal for now is to do more with less.

**Overview**  
Introduction to CRM  
Benefits of CRM  
3 Phases of CRM - Reporting, Analyzing, Predicting  
Case Study  
Challenges of CRM  
Future of CRM  
Conclusion  
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**From Sales Force to Customer Focus**  
- Ask Customers - Identify customer feedback  
- Ask Customers - Use customer feedback  
- Ask Customers - Analyze product, service, marketing  
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**The Age of the Customer**  
- Companies must generate an "extra profitable experience" for customers...  
- How to maximize a global customer base?  
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**Future of CRM**  
- Customer relationship management (CRM) is the process of analyzing and identifying individual customer needs and preferences.

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**Sales and Operational CRM**  
- Sales CRM: To help salespeople sell more effectively  
- Operational CRM: To help salespeople manage their sales process  
- Sales Management CRM: To help salespeople manage their sales process  
- Sales Analytics CRM: To help salespeople analyze their sales process  
- Sales Reporting CRM: To help salespeople report on their sales process

**Operational and analytical CRM**  
Operational CRM  
- Day to day, traditional transactional interactions  
- Sustained directly with the customer  
Analytical CRM  
- Back office operations  
- Secondary interactions  
- Sustained indirect directly with the customer

**Marketing and Operational CRM**  
- Marketing CRM: To help marketers manage their marketing process  
- Operational CRM: To help marketers manage their sales process  
- Sales Management CRM: To help marketers manage their sales process  
- Sales Analytics CRM: To help marketers analyze their sales process  
- Sales Reporting CRM: To help marketers report on their sales process

**Customer Service and Operational CRM**  
- Contact centers  
- Customer support / product sales  
- Web-based self-service  
- Customers in control  
- One-to-one customer service  
- Click to talk  
- Call waiting  
- Used for trouble-shooting technical problems

**Analytical CRM**  
Uses business intelligence to identify patterns in product sales and customer behavior, allows for targeted approach.  
- Find New profitable customers  
- Exceed customer expectations  
- Discover activities that the firm does best  
- Eliminate competition  
- Care about customers

**Cross-Selling and Up-Selling**  
- Cross-Selling: Selling additional products or services to an existing customer  
- Up-Selling: Increasing the value of the sale



CRM Software solutions  
The next step in building customer loyalty  
- Microsoft Dynamics  
- Salesforce  
WANTED:  
Marketers with IT experience  
Technicians with marketing know-how  
... to manage multiple points of entry  
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*Foan Shapiro Beigh*

*Forge Sanchez*

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sales force

, virtual

to customer

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## *Overview*

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# *From Sales Force to Customer Focus*

- 19th Century – insatiable customer demand
- 20th Century – choosy customers, sales force focus
- 21st Century – disruptive products, virtual marketplace
- Successful companies have shifted to customer focus

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# *The Age of the Customer*

...Companies must generate an “unforgettable experience” for customers ...

Q. How to manage a global customer base?

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## CRM Software solutions:

The next step in building customer loyalty

- Microsoft Dynamics
- SalesForce

### WANTED:

Marketers with IT experience  
Techies with marketing know-how

... to manage multiple points of entry

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# Multichannel CRM

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