

EXERCISES

Exercise 11.1. Profiling your CRM maturity

Please fill in this form to assess your multichannel CRM maturity. If appropriate choose a business unit to fill it in for you.

Company/Business unit: _____

If you have several different customer groups (boxes on the market map/value network), choose *one* group and fill in the form for this group. For example, a pharmaceutical company could fill in the form for hospital specialists, primary care practitioners (GPs), patients, etc. A financial services company could fill it in for consumers, insurance brokers, company pension schemes, etc.

Customer group: _____

Step 1. Thinking of this customer group, to what extent do you agree with these statements? Please score out of 7, where 7 = 'strongly agree' and 1 = 'strongly disagree'.

Integration maturity

		Score 1-7
Q1	<i>Data integration:</i> We have integrated customer data across all products and channels, which gives us all the information we need on a customer	
Q2	<i>Communications integration:</i> We have a single person responsible for coordinating all inbound and outbound communications with each customer	
Q3	<i>Process integration:</i> Our processes for responding to each customer are joined up through the customer journey, so each step leads seamlessly to the next	
Q4	<i>Structure integration:</i> Our organizational structure encourages all staff to look after the interests of each customer holistically and grow their customer value	
Q5	<i>Metrics integration:</i> Our targets and reward systems encourage all staff to look after the interests of each customer and grow their customer value	
	Total:	
	Integration score – Divide total by 5:	

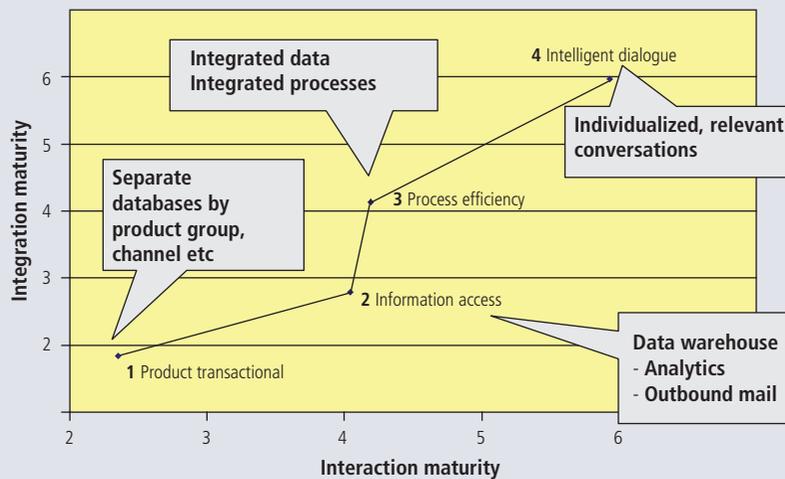
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Interaction maturity

		Score 1-7
Q6	<i>Individualization</i> : Everything we say or write to customers is based on individual-level customer insight	
Q7	<i>Customer value orientation</i> : We understand the lifetime value of each customer and take this into account in all our dealings with them	
Q8	<i>Customer centricity</i> : We put our customers' interests first when making sales or service propositions to them	
Q9	<i>Dynamic interaction</i> : What we say or write to customers depends on what the customer has said to us within the same dialogue	
Q10	<i>Customization</i> : We tailor our products and services to customers on the basis of individual customer insight	
	Total:	
	Interaction score – Divide total by 5:	

Step 2. Plot your company/business unit on the grid below. Which stage are you nearest? Of course, all companies vary, so each stage is the centre of a 'cluster' and you may well be between stages, or stronger on integration than interaction or vice versa.

Step 3. The tables below list the aspects or dimensions of multichannel CRM maturity which we were asking about in the questions above. What do you think your company's next



steps could be to improve your multichannel CRM maturity? Choose two or three questions/dimensions where you think you could improve your performance, and write how this might be achieved in the right hand column.

Integration maturity

	Integration dimension	How we might improve
Q1	Data integration	
Q2	Communications integration	
Q3	Process integration	
Q4	Structure integration	
Q5	Metrics integration	

Interaction maturity

	Interaction dimension	How we might improve
Q6	Individualization	
Q7	Customer value orientation	
Q8	Customer centricity	
Q9	Dynamic interaction	
Q10	Customization	

Exercise 11.2. Designing a CRM project

1. Take one or more of your 'next steps' for CRM development which you identified in Exercise 11.1. Develop a Benefits Dependency Network for how you will achieve this greater level of CRM maturity. See the section 'Planning for CRM' for an example. You will need to work in conjunction with colleagues across marketing, sales, customer service and IT in order to develop this key project management tool.
2. Now identify who is responsible for each box on the network. Note that it is not realistic for an IT director to be responsible for business changes which fall outside of the IT function!
3. Now develop measure for success for each box on the network. How will you know when objectives have been reached? When benefits have been delivered?
4. Finally, set up a project team to implement the project. Use the BDN to track not just whether each step in the project plan is achieved on time and to budget, but crucially, whether the intended benefits are being achieved. Only declare project success when this has happened.