



## The New Rules of CRM and the “How” of Making it Real

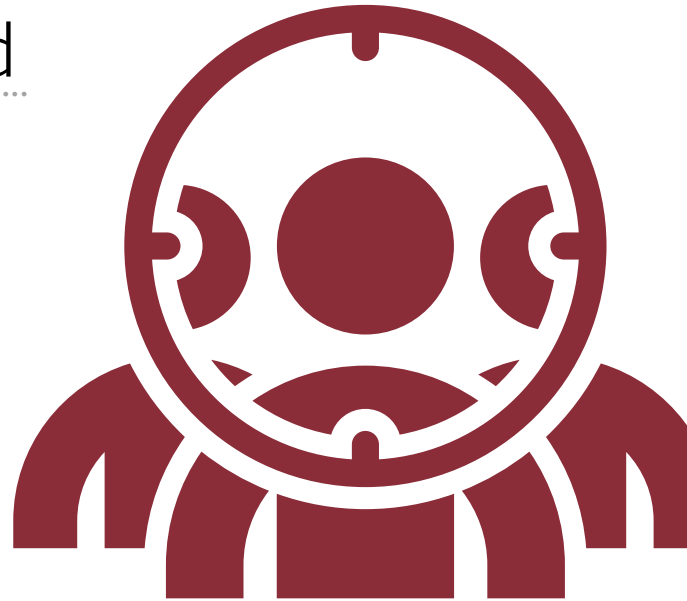
CRM has been here for a couple of decades but never took the role of a central nervous system of an organization. It has today. The focus on customer-centricity and the rapid change in business models made CRM the life-blood of any organization large or small.

This point of view helps you understand the new realms of CRM and gives you a step-by-step guide to implement and realize your business objectives. It talks about the industry changing trend that has put customer at the center of an organization's strategy, the evolution of CRM to being CERM, the anatomy of CRM and importantly the implementation plan that can make it all real.

# The industry-driving trend

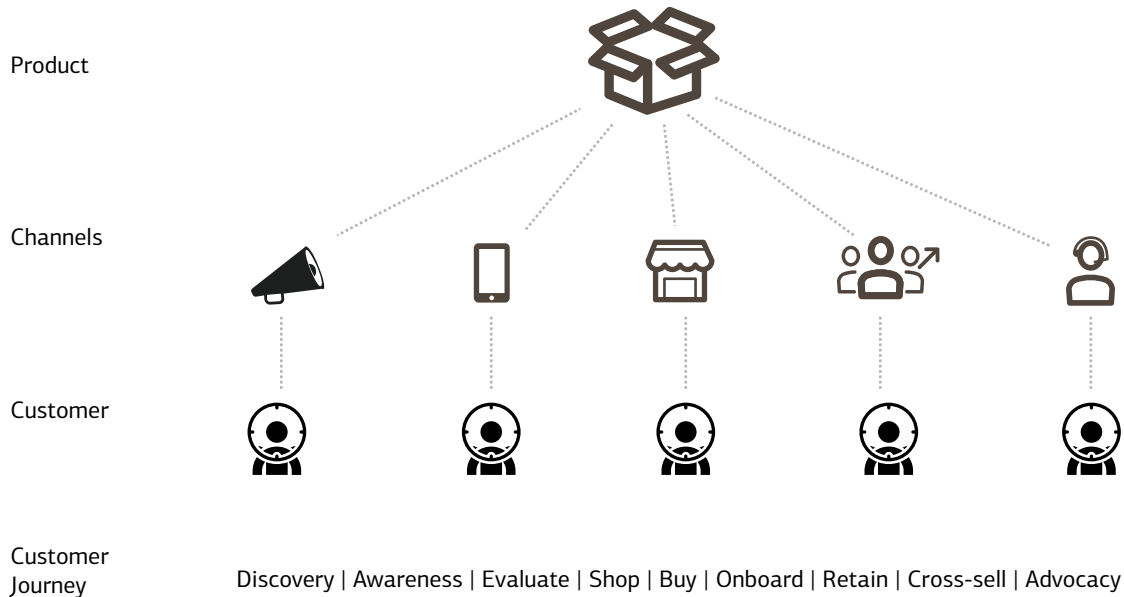
The big industry changing trend is the transition from products to the customer-centric era. This trend is also dubbed as “the age of customer”, “product-centric to service-centric”, “age of hyper personalization”, “subscription-economy”, “Fourth Industrial Era” and more.

Netflix, Uber, Dollar Shave Club, Microsoft, Adobe, Airbnb – What is common with these and several other such companies? They’ve understood the importance of the customer centricity and either changed their business philosophy or built their business keeping customer at the center of it all.



# Are you still operating in the legacy world?

Here is how the economy driven by products looks like where the products were larger than life and defined the marketing & sales channels, distribution and the customer segmentation. Customer journey was almost an afterthought during this time.

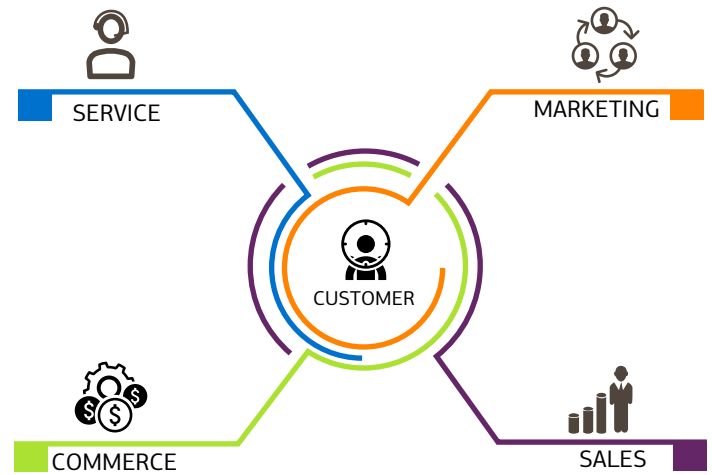


## Welcome to the Customer-Centric culture

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Customer-centricity is by no means a new concept. But it is now that most businesses have changed their philosophy and structure to ensure that the customer gets the best service.

Today, many customer centric organizations are putting the customer at the center of their strategy and then designing the customer journey as a first step. The sales, marketing, commerce and the service components are built around the customer journey.



## Implications of the customer-centric economy

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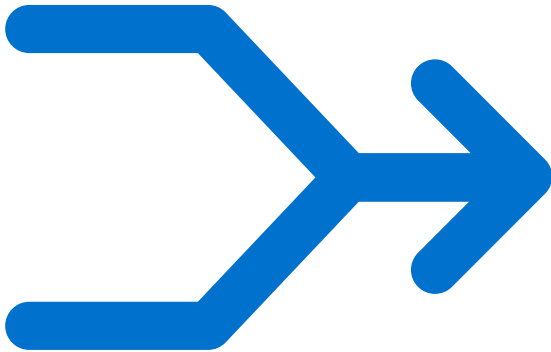
### Products to Services mindset -> Ownership to Usership

Customers are not any more willing to own products, they just want to use them. Soon you might just use the phones, houses, cars and even detergent and not own them. Infact Ford has already launched a subscription-based model for customers to use a car without buying it. Tien Zuo, CEO of Zuora states that the subscription market can itself be about \$8 Trillion in the near future.



## Customer experience has taken the center stage

Customer Experience is the new battleground for the digital age businesses. As per the “Gartner Customer Experience in Marketing Survey,” 81% of the marketing heads reported that they would be competing mostly or entirely on the basis of CX by 2020. In the context of usership-based economy, the last thing that you can take for granted is the customer experience, making designing the right customer journey ever more critical. A bad experience will make you shift from Netflix to say Disney (the latest entrant) within no time.



## Unifying organizations into one unit

In the earlier era organizations have thrived by operating in siloes with key functions, such as Marketing, Sales, Commerce, Service etc. It is important for you to redesign the business processes to deliver consistent customer experiences. CRM meant different things to the Heads of Sales, Marketing and Customer Service. However, the customer-centric era is pushing all these functions to work as one unit as the customers are demanding unified experience. Businesses must unify all their front office functions into one and deliver a unified experience to customers.

## Personalization is the key

Gone are the days when you as a product/service provider give options to the customers. Today, customers want to create their own options and choices based on their usage pattern and needs. The subscription and pay-per-use model have given the power of choice back to the customer – where it rightly belongs. E.g Netflix constantly tries to understand our usage pattern and its recommendations engine knows exactly which movies we like and then brings it on the main screen.



# CERM to the rescue

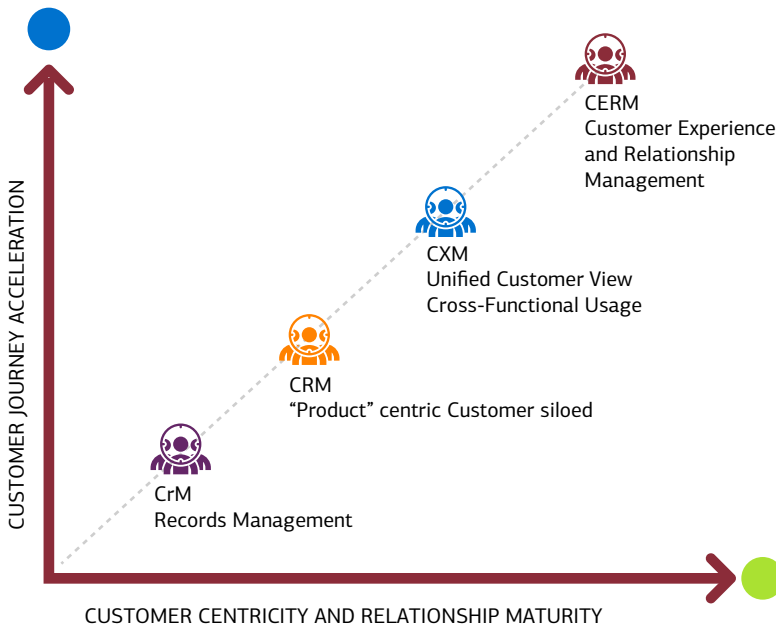
It almost feels like magic when Netflix recommends your favorite movies, the bank calls you just in time with an offer on your card, your favorite hotel sends out a discount coupon just when you want it, your favorite airlines recommends the right destinations when you want to take a vacation.

Well, sorry to burst the bubble, but we know that it's far from magic. But yes, there is one solution that can help you constantly create such experience for your customers. And that, is the CERM.



## Evolution of CERM

A quick caveat here is that the CRM has evolved massively to be in sync with the current times. It's not the CRM that you might be thinking that was just used to store customer related information.



**CrM:** Back in the day when CRM was introduced and long after that it was used just to manage customer records. All you'd see in the tool was data entry of the customer transactions. There was no analysis nor any insights coming out of the system.

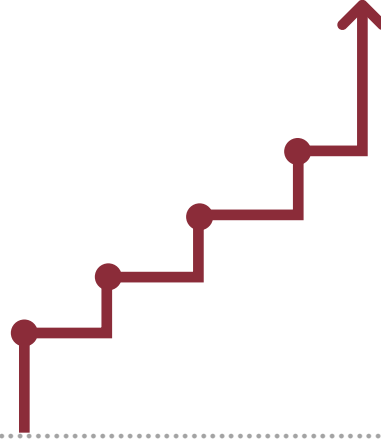
**CRM:** The subsequent stage saw the CRM implementation based on products/services that the organizations had. Here is the classic case of the CRM having several records for the same customer and varied history.

**CXM:** This is the first time that the customer had a single record and importantly the experience expanded from just sales and marketing to commerce and the customer service too.

**CERM:** CERM is the journey and a framework for the customer-centric economy. Today, CERM is the singular framework that captures the customer journey, aligns the processes, unifies the organization silos and delivers unified customer experience almost single handedly.

# The anatomy of a CERM

Truth be told, CERM is neither a trend nor a technology. It is an evolved response to the industry changing trend we've spoken about earlier. It captures the business strategy, customer journey, people, processes, technology to understand, target, acquire, retain customers consistently.



## CERM – The full picture

Business Strategy	Customer Journey				
Business Processes	Marketing	Sales	Commerce	Service	
CX Components	Personalization	Engagement	Contextual Intelligence	Relationships	
Technologies	Customer Analytics	Customer Data Management		AI/ML	Automation
Technology Modules	CPQ	Pricing Management	Sales & Marketing Automation		Lead to revenue Management
	Contract Lifecycle Management		Billing	Customer Feedback Management	Partner Management
Customer Lifecycle Activities	Customer Targeting	Customer Acquisition	Customer Retention	Customer Upsell /Cross-sell	Customer Advocacy

CERM rightly starts with the customer journey, unifies the business processes, gives the right insights to elevate the customer experience, provides the technologies & modules to scale the customer engagement and importantly helps you be on top throughout the customer lifecycle. Now you see why CERM is such a powerful framework for the business survival in the customer-centric economy.

[Read here 6 aspects that you need to consider while selecting the right CRM.](#)

# CERM driven CRM design and implementation

CRM has come a long way from where it started and now has become the bloodline for any organization. Unfortunately, we still see some organizations investing heavily into CRM and still use it to manage customer records forgoing the power that the platform offers. Even more heart-breaking trend is that the utilization of a CRM is not more than 40% to 50% across organizations.

While we can come up with several reasons for the under usage, the core of it all goes to the way CRM is envisaged and then implemented in a business. In this section, we will take you through the whole nine yards of CRM design and implementation based on the CERM framework we discussed in the earlier section.



## Things to know before implementing the CRM

### Strategic, business and operational focus on customer

All our grand vision on the customer will have to be translated into action during the CRM implementation. If you pay lip service to customers and keep the business processes siloed, that will not serve the purpose. The CRM program must clearly define and link with the customer benefits, business outcomes, the organizational KPIs.

### CRM is not an IT solution anymore

True, you don't just look up to the CIO for implementing the CRM. Today, it is a business solution and all the customer facing (front office) teams get involved in the CRM decision and implementation. An IT solution like implementation will get the same benefits you'd have received way back in early 2000s. Think it to be a business solution and start with the customer journey. Remember, it is the customer experience that you have signed up to change.

### CRM implementation is a change management program

CRM is not an app that you install and roll it out to the entire organization. It needs involvement of all the business processes right from the goal definition stage right until measuring the outcome. Aligning the businesses processes with customer journey would mean changes in the processes, breaking down organizational silos and sometimes even the business model. Lack of team involvement and collaboration is one of the primary reasons for low adoption of CRM. Successful CRM implementations have considered it as a change management program than a tool rollout.

# Glimpse of a CRM implementation plan

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So here is where the rubber hits the road. Each stage in the process (as described in the image below) is extensive and important on its own. The plan is an indication and gives you an overall view and highlights the key aspects that you need to consider.

	<b>Customer Journey Design</b>	Identify customer touchpoints Define customer experience
	<b>Business Goal Alignment</b>	Understand current processes Pain points of current process Interact with business process owners Define business goals Align goals with customer journey
	<b>Discovery</b>	Investigate data sets Interview staff Business capabilities Future strategies Business outcomes Customer expectations
	<b>Pilot</b>	Select the pilot ground Build rapid prototypes Make adjustments
	<b>Define</b>	CRM scope Roles of players Outcomes Information architecture
	<b>Platform Selection</b>	CRM research Identify the right platform
	<b>Develop &amp; Test</b>	Identify out of the box features vs custom built Data model & taxonomy development Information architecture Business process modifications as per customer journey Integration with the business processes
	<b>Rollout &amp; Training</b>	Stage-wise rollouts Training to all business process teams Show and tell sessions Set up troubleshoot teams Develop glossary





We are in the customer-experience economy which is forcing organizations to blur the boundaries amongst its key functions, such as marketing, sales, service and commerce. It is time for organizations to go beyond CRM as a tool thinking and reimagine their strategies through the base set by CERM. That is where the true value of CRM is hidden in delivering the true value of customer experience.

Reach out to us at [info@brillio.com](mailto:info@brillio.com) to learn how we make successful CRM implementations real and discover our CERM maturity index that helps you prioritize your business goals and move towards achieving your organization's vision.

## ABOUT BRILLIO

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