

Optimize CRM Processes

TechExcel CRM

Introduction

The Internet has fundamentally changed the way we do business, and it has created huge opportunities for entirely new business models, from Web portals to e-commerce. Many of these new companies have succeeded, and many have failed, but this first wave of the Internet economy has set the stage for even more innovation and success throughout all sectors of business. As exciting as the dot-com revolution was, the Internet continues to provide an even greater opportunity for more traditional businesses.

Optimizing Today's Business Processes

All successful business models are based on process. It is efficient, well-defined business processes that differentiate average companies from exceptional ones, and the Internet now provides the opportunity to truly re-define and optimize these processes. Companies that do not recognize this fact will soon find themselves unable to compete in the new economy.

To fully optimize any business process it is essential that every person involved be an active participant in the process itself. When key players are outside of the process, and play only a

passive role, inefficiencies are inevitable. Individual's roles may be different, with varying levels of authority, visibility, access, and control, but within these parameters each person must actively participate in the process to achieve the greatest results.

Companies that embrace this active-process model and implement it to the full extent that technology will allow will quickly achieve a significant competitive advantage. Today the foundation of all business processes is software, and the best software solutions will always take full advantage of the available technology to optimize the business processes for which they were designed.

Traditional CRM Systems

The most critical processes for any company are those that directly touch their customers, since it is the customers that will ultimately determine a company's success or failure. Traditionally CRM systems represent the core of every business and typically included Marketing, Sales, and Customer Support.

Even though CRM processes are all focused on the customer, software applications in this area have historically treated customers as very passive elements. In the 1990s CRM applications were designed around conceptual models optimized for the available technology. Windows-based client/server systems allowed for elaborate collaboration

within organizations, yet customer involvement was limited to basic communication via phone, fax, e-mail, and limited Web sites. This Passive Customer model, while fundamentally flawed, was the only feasible approach given the technological limitations of the time.

Figure 1 illustrates the traditional Passive Customer model. CRM software providers have developed many creative ways to graphically represent this model, but they all share the same common focus on the interaction between the core business groups, and the customers and business partners do not have any direct access to, or interaction with the central database.



Figure 1 – The Passive Customer Model

Technological advances such as personal computers, wireless communication, and the Internet have significantly enhanced our ability to communicate with customers, but the architecture of established applications remains tied to the traditional Passive Customer model. These systems focus almost exclusively on the interaction, communication, and collaboration within the organization, and simply relay the pertinent information to customers and business partners.

While today's communication methods are very efficient, utilizing elaborate Web pages and e-mail systems, the customer is still simply being served and does not play an active role in the process itself. Every company has a Web site today and many provide customers with Web access to account information, but having a sophisticated Web presence is vastly different from truly Web-enabling your business processes.

The Active Customer Model

In today's extremely competitive Internet economy it is more important than ever for companies to fully embrace new technology to optimize their business processes. Advances in Internet and wireless technologies now allow companies to fully incorporate their customers and partners into their core business processes as truly active participants.

To achieve this, however, requires powerful software solutions based on more sophisticated conceptual models than the traditional Passive

Customer approach. One unique new approach that provides a framework for this new generation of CRM is called the Active Customer model.

The Active Customer model incorporates the three core business groups - employees, customers, and partners - directly into each of a company's CRM processes. The model no longer focuses on the interaction and communication between these groups, but instead emphasizes the incorporation of each group into the process itself. Communication between the company, its partners, and its customers simply becomes a

natural byproduct of the system, not the basis of the system itself.

Figure 2 illustrates the Active Customer model, highlighting how customers and business partners are incorporated directly into the business processes, each having appropriate and controlled access to the central database.

To fully realize the Active Customer model, however, it must be integrated directly into the software application's low-level architecture. Every aspect of the system from individual field customization to advanced workflow and process automation must be conceived and designed from the beginning with this model mind. Unless the Active Customer model is designed into the system from the very beginning, there is little chance of achieving the optimal results.

The well-established CRM software providers developed their software architectures at a time when the Internet and wireless technologies were in their infancy. While many of these products are mature and well designed to manage the Passive Customer model, they simply cannot be easily re-designed to support this new, more optimized approach. So, as with most significant technological trends, it is the small innovative software providers that have the advantage by designing comprehensive CRM solutions around these new Active models from the very first line of code.

Below are a few examples of how the Active Customer model must be integrated into the application's low-level architecture.

- One of the basic process automation features in high-end systems is automatic notification. Simply stated, the right people need to be notified about the right events at the right time. Under the Active Customer model, both customers and partners can be easily configured to be notified in the same manner as the support team, keeping them fully informed about all actions taken with respect to their issues.
- While all customers and partners should be active players, each of them does not require the same level of access, visibility, or authority within the system. So software solutions based on the Active Customer model must allow for multiple customers access types, each with its own definable set of privileges.
- With the Active Customer model the customers themselves should be able to be assigned ownership of specific tasks within the process. These tasks can be completely defined by the company, but the software architecture must easily allow these tasks to be defined and assigned to the appropriate customer contact. In some cases these customer-owned tasks or events should even be automatically created as a designed part of the business process workflow.

Software developers must have the right conceptual model in mind at the very early stages of software development in order to optimize their solution. Once a system has been designed and implemented around one approach, such as the Passive Customer model, it is nearly impossible to change that underlying model by simply adding new features, modules, or interfaces.



Figure 2 – The Active Customer Model

Intelligent Implementation is Essential

Adopting the right conceptual model is critical for any business software application, but that is only the beginning. The implementation of this model must be well conceived and well executed, and requires a sophisticated approach to ensure success. One such approach, which TechExcel refers to as eIntelligence, asserts that to optimize any business process software solutions must be powerful, configurable, deployable, accessible, scalable, and secure. Each of these software requirements is outlined below.

1. Powerful

At the most basic level, optimized software solutions must provide all of the high-end features and functionality required for the process, and adopt the conceptual model most appropriate for the business process.

2. Configurable

These powerful features must be completely configurable to reflect every aspect of each company's unique processes, and must be easily customized directly by the people with the most intimate knowledge of the process.

3. Deployable

Once configured, the system must provide easy deployment throughout any size organization. This includes fast and complete data migration from previous systems, efficient end-user setup and installation, ease of training and ease of use, and rapid user acceptance and system adoption.

4. Accessible

Once deployed, every internal user, customer, and business partner must have the appropriate access path to the system, whether Web, wireless, or client/server. All users must have the full and complete power of the system available, regardless of the access path, and all access paths must be usable in any combination, synchronized to a common database in real time.

5. Scalable

The fully deployed and accessible system must easily grow with any size organization, from start-up to fortune 500, and easily expand as the number of users, customers, and partners increase. Systems must allow critical features to be added or enabled to support changing and evolving processes.

6. Secure

Throughout configuration, deployment, and use all aspects of the system must remain completely secure, and system administration privileges must be tightly controlled. Password-controlled access must be implemented for everyone using the system, and extensive and definable privileges must be assigned for every user, customer, and partner.

Summary

In today's competitive economy, companies will succeed or fail to a large degree based on how well they manage their customer relationships. This requires a careful evaluation of all customer-focused business processes, including Marketing, Sales, and Support, and then implementing intelligent high-end software systems to optimize these processes.

The traditional Passive-Customer model of CRM, on which most of the established software solution are based, is fundamentally limiting in that a company's customers and business partners cannot be included as active participants of the processes themselves. They are only viewed as the recipients of information that is generated from the process.

A new, more powerful approach is the Active-Customer model, pioneered by TechExcel, Inc. With this model every person involved in a business process is treated as a truly active player, and given the appropriate level of visibility, authority, and control.

Companies that embrace this new model of Customer Relationship Management will quickly gain a sustainable competitive advantage within their market by fully optimizing their CRM business processes. These are the companies that will succeed and grow in the new Internet economy, and those companies that do not adopt such a model, will quickly be left behind.

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