

*Part One*

Determining and  
Aligning the CRM Vision:  
— Overview

# O V E R V I E W

The CRM vision is the starting point in the achievement of performance driven CRM. It directs us to the desired end state and sets the course to start us on our journey. Without this vision, the road to successful CRM will be difficult, and without tailoring it to your current needs—your strengths and competencies, the speed to market required, and business benefits needed to substantiate the investment in the CRM initiative—only limited, and possibly only short-term success will be achieved. Chapter 1 provides you with the tools to revisit your vision to ensure that it will meet your future needs.

Those organizations with successful CRM initiatives have been effective in:

- keeping their CRM vision relevant and alive
- excelling in using performance information to cycle back to the vision each year for validation or change that reflects new customer needs
- maintaining a focus on key areas required to achieve the overall CRM vision
- analyzing the performance information to demonstrate that they are getting closer to the vision
- creating the information required to align the organization against its CRM vision

Chapter 2 addresses these subjects in an effort to ensure that you stay on the proven path and avoid the potholes and detours that so many have traveled. But first, are you ready to start?

## CHECKLIST: ARE YOU READY TO START?

Here's an exercise to start you on your way. Answer the following questions about your readiness to create a CRM vision. A scoring guide and evaluation of your readiness to proceed can be found at the end of the checklist.

	<b>To a very limited extent</b>		<b>To a very great extent</b>		
1. Customer segments are well defined.	1	2	3	4	5
2. The company uses customer satisfaction surveys for understanding customer needs and what satisfies and dissatisfies customers.	1	2	3	4	5
3. Human resources management practices empower all employees to participate in improvement initiatives.	1	2	3	4	5
4. Employees at all levels receive the education and training they need to participate effectively.	1	2	3	4	5
5. Senior executives are personally and visibly involved in demonstrating that improved customer satisfaction is a high priority strategic goal.	1	2	3	4	5
6. Customer service performance measures exist at the organizational, departmental and individual job levels and are widely publicized and acted upon.	1	2	3	4	5
7. Communication is frequent and informative.	1	2	3	4	5

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8. All employees are aware of their internal customers and suppliers. 1 2 3 4 5
9. The working environment is conducive to the well-being and morale of all employees. 1 2 3 4 5
10. The organizational hierarchy does not inhibit effective and constructive two-way communication over process improvement issues. 1 2 3 4 5
11. The company's values are clearly articulated and understood by all employees. They are constantly and consistently reinforced by the actions of all managers. 1 2 3 4 5
12. Goals for customer satisfaction make us stretch but are attainable. 1 2 3 4 5
13. The company encourages close collaboration and teamwork. 1 2 3 4 5
14. The employee performance appraisal, recognition and reward processes strongly promote involvement in delivering customer satisfaction. 1 2 3 4 5
15. Business processes are regularly reviewed to eliminate nonvalue-adding activities and improve customer satisfaction. 1 2 3 4 5
16. Relationships with customers are managed effectively and involve obtaining information from them to improve products and services. 1 2 3 4 5
17. Business cases for change are clearly articulated and validated. 1 2 3 4 5

18. Customer complaints are welcomed and resolved quickly and positively.      1   2   3   4   5
19. Effective processes for determining current and future customer requirements and expectations are applied both systematically and rigorously.      1   2   3   4   5
20. The strategic and business planning processes have a strong focus on customer service and produce clear objectives for improvement.      1   2   3   4   5

**Scoring:**

Add up your scores on all 20 questions. If your score was:

- less than 40: This book will provide you with a strong foundation as you start to build an organization dedicated to performance driven CRM. Chapter 1 is a mandatory starting point.
- 40 to 74: You are only halfway there. A deeper understanding of your organization and its competencies is necessary. The performance programs described in Part Two are key to your achievement of performance driven CRM.
- greater than 75: You are well on the road. The book offers best practices of others to learn from as well as other advanced techniques. Pick and choose those chapters that give you the most relevant guideposts.

So how did you do? Are you ready to start on your journey?