



CASE STUDY – CRM REVIEW

Business Issue

This travel company has recently implemented a CRM system across the various brands within their business. The Board of Directors asked us to help them as they were unsure whether they were on the right track and reaping all of the potential benefits from their CRM investment.

The organisation's main objectives for implementing CRM were:

- to increase profitability through improving sales productivity and efficiency
- to deliver a single view of the customer's detail across their multiple brands
- to implement effective campaign management and ROI analysis
- standardisation of processes and reporting

Analysis Undertaken

Our team conducted an initial audit, including reviewing the CRM business requirements, the system functionality, carrying out a full data audit and a review of processes across the business.

Our findings and recommendations were then presented to the Board of Directors and other project stakeholders.

Focus2020 Recommendations

Our main recommendations were:

- The technology infrastructure needed to be upgraded to provide a reliable service for all brands. This involves introducing a single server architecture to resolve synchronisation issues, delivering improved remote access for disparate offices and sales representatives, and addressing the existing system bugs that were identified.
- Data integrity was inadequate and needed to be improved to ensure accuracy. Our proposal involved appointing a database administrator responsible for data quality across the brands, developing the database structure further to accommodate richer data collection, tightening up business and validation rules to prevent data corruption, creating data access rights so that data changes remain consistent and defining best practice rules.
- Report and measure; the business should use dashboard functionality within the system to report on Key Performance Indicators (KPI's) for coherent and rapid reporting to higher management.
- Build on effective segmentation models defined by one brand, and share this across other brands to improve sales targeting and efficiency.
- Standardised marketing functionality should be used by all brands to ensure consistency and visibility of communication. The company should implement an effective campaign management tool and ensure response feedback/reporting when using 3rd parties.
- Develop on-going training and mentoring programs to maximise efficient and consistent use of all CRM functionality.
- Ensure all users benefit from upgraded functionality and are on the same version / platform of the CRM solution.



Business Impact

- The company has already made some big improvements since the implementation of the system. Our independent audit was well received throughout the business, and using the report and recommendations from Focus2020, the company was able to re-focus their priorities for future development.
- We introduced industry standard data for cleaner, more accurate customer information.
- The company now has a single, consistent view of the customer that all brands share.
- Implementation of our action plan has resulted in a measurable increase in sales productivity.
- The company now has more consistent and effective Campaign Management & Reporting capabilities across all brands.