



# ENTERPRISEWIZARD WHITE PAPER

## THE NEED FOR CUSTOMER-CENTRIC CRM



ENTERPRISEWIZARD

460 Seaport Court Suite #200 Redwood City, CA 94063

888.727.2209 650.587.8615

[sales@enterprisewizard.com](mailto:sales@enterprisewizard.com)

[www.enterprisewizard.com](http://www.enterprisewizard.com)

# Table of Contents

<b>Problem: Most CRM Software Neglects the Customer .....</b>	<b>1</b>
<b>Solution: Bring the Customer Back into CRM Software .....</b>	<b>2</b>
Customer Requirements .....	2
Sales Team Requirements .....	3
<b>The EnterpriseWizard CRM Solution Meets All of these Needs .....</b>	<b>3</b>
<b>Conclusion .....</b>	<b>4</b>
<b>Next Steps.....</b>	<b>4</b>

## Problem: Most CRM Software Neglects the Customer

Despite its name, most Customer Relationship Management (CRM) software caters to salespeople rather than customers. It improves sales processes through automation, monitoring, and measurement—an extremely valuable function. However, it does not do the arguably more important work of improving the customer experience.

This isn't surprising. After all, it's a lot easier to provide a lead tracking solution used only by salespeople than an application that offers fine-grained access control, a branded interface for different sets of customers, and business rules and workflow automation to ensure that customer needs are met in a timely fashion.

Yet, this neglect of customer needs is a mistake. After all, potential customers evaluate potential suppliers in part by the quality and reputation of their support. Plus, the best way to increase revenues from existing customers is to satisfy them with superior support and to anticipate their needs and wants.

What are the most critical omissions of many CRM products? For one, most such software does not include a customer interface. As a result, customers cannot access their support tickets or order status, or find answers to questions outside of their suppliers' regular business hours.

Two, many CRM products are designed for use by the sales team only, despite the fact that customers usually interact with other departments as well, such as Technical Support and Customer Service. So, when a customer who has reported product bugs to Technical Support next speaks to Sales, the latter will likely not know about those issues and communications. If they did, they might, for example, offer a special reduced rate as an incentive to continue the customer-supplier relationship.

Three, many CRM systems simply don't do a good job of managing workflow and notifications. The end result can be a lack of supplier responsiveness and missed issues, definitely not a recipe for customer satisfaction.

As a personal example, a few years ago, we worked with a co-location provider. We discontinued our relationship with this company—whom I'll call "Monumentally Flaky Networks"—because they did not return phone calls, took days to respond to emails, sent warnings of outages to the wrong address, and generally messed up at every opportunity. As a result, the sales guy who called to see if we wanted to renew our contract never had a chance. He could have offered a T3 line and 80 units of rack-space for \$50 a month, and I would still have slammed down the phone.

Shockingly, this company was using a well-known CRM system, software that probably scheduled the call, but did absolutely nothing to retain me as a customer.

# Solution: Bring the Customer Back into CRM Software

So, what could Monumentally Flaky Networks have done, and what can *you* do to ensure that you attract and retain customers? Use a CRM system that caters to the needs of customers and Sales, and focuses the entire organization on the execution flow from sales to support and upgrades. What should such a solution look like?

## Customer Requirements

Ask yourself what you look for in your interactions with companies. Although I do not claim to speak for everyone, here are some of the attributes that I value in my experiences with suppliers:

- **A Good Corporate Memory**

Whether I am talking to Sales, Support, Marketing, or Business Development, I expect the rep to have accurate information about my account and past interactions. The CRM software must track and maintain this information across all departments.

- **Dynamic FAQ**

Except for proprietary data, which may include pricing information, I expect to get the answers I need at any time, day or night. This implies that the software must include a dynamic FAQ system that covers both sales and support issues. A static FAQ with a dozen questions and answers is rarely adequate.

For the supplier to appropriately respond to questions not covered by the FAQ, it has to collect accurate information, such as what operating system I'm using or how many seats I want to purchase. This requires Web-forms tailored for each department and interaction type. Such forms ensure that the necessary information is gathered without rounds of telephone tag.

- **A Customer Interface in My Own Language**

My language happens to be English, so this is seldom a problem. However, imagine how the rest of the world feels. The aforementioned Web-forms must prompt the user in their own language.

- **Responsiveness to Email**

When I submit an email, I expect an immediate response confirming that my message has been received, along with a tracking number to which I can refer in subsequent conversations.

- **Guaranteed Service Levels**

If the company promises to respond to issues within a certain number of hours or days, I expect it to do so. The CRM software needs to notify the appropriate individuals in order to ensure that these service levels are met.

- **Personalized Service**

Since the sales process depends on the cooperation of multiple departments, effective sales software must be configurable to meet their various needs. This often requires custom business objects and relationships. For example, a drug company may need to keep tabs on FDA directives, while an accounting organization may need to track SEC filings and their relevance to each of the companies in their portfolio.

For B2B organizations, the software must be configurable to meet the needs of individual customers. One customer may want a weekly status report on the progress of a custom order, while another may ask for daily reports, and a third will login to the Web site on an ad-hoc basis. Such customization should not require the assistance of IT staff or programmers. Unless the business manager or the customers themselves can easily do it, the system will never stay abreast of ever-changing requirements.

## Sales Team Requirements

- **Salespeople**

CRM software should quickly and easily provide salespeople with the right customer information. This way, they can make the appropriate targeted pitches: for a service contract upgrade, a new product offering, or a request for a referral. For example, sales reps should easily be able to pinpoint all of the customers who've expressed interest in a new feature over, say, the past three months. The software should then automatically personalize one letter they've written with the various customers' names. Next, the software should send price quotes to these interested parties.

- **Sales Manager Requirements**

Effective sales software will enable sales managers to do far more than wring additional cold-calls-per-day out of their teams. Although such metrics are highly useful, CRM software's assistance in resolving sales process blocks could be considered even more so. For example, automatic customer surveys can identify which sales and support reps not only closed the most issues, but also made customers feel welcome.

To meet these various needs, CRM software requires powerful workflow and escalation systems to route information to those who need it. It also must include precise access control at the object and field levels to ensure that people can only create, edit, view, and delete the data for which they are authorized.

## EnterpriseWizard CRM Solution Meets these Needs

Naturally, EnterpriseWizard offers all of these features. That's because we approach CRM with the goal of not just helping our customers close initial sales, but also providing their customers with the superior support that drives future sales. Our comprehensive CRM package includes everything companies need to gain and retain new customers, and generate repeat business. Here are some of its highlights:

- Our CRM solution allows companies to integrate all customer-facing processes on a single platform. Our adaptive system is easily customized to match our customers' precise business needs, without programming.
- Our robust support system, featuring built-in customer surveys, mass emails, and 360-degree customer views, provides all the tools you need.
- Automatic notifications from the support system ensure that sales reps are aware of outstanding support issues. This way, they can address the concerns of potential and current customers more effectively.
- Dynamic reports and dashboards, robust searches, and escalation rules provide managers with the insight to recognize upcoming opportunities and challenges in time to meet them.

Our solution's default CRM template includes the structures to manage leads, contacts, opportunities,

campaigns, product lists and pricing, price quotes, deals, support and service contracts, vendor contracts, partner relationships, consulting projects and time billing, customer assets, pre- and post-sales support, and more.

Learn more by visiting the CRM page of our Web site at <http://www.enterprisewizard.com/crm.htm>.

## Conclusion

Sales depend on far more than just the sales team. In fact, they require the collaboration of a company's various departments to determine and satisfy customer needs. In order to generate more revenue, CRM software must go beyond improving sales processes. It should be customer-focused and broad in scope, spanning multiple departments and offering deep customization. The end result: initial sales will turn into repeat sales, and ordinary customers will become reference accounts.

## Next Steps

[Sign up for a personalized demo](#) showing your toughest business process automated.

[Set up a free hosted KB](#) to try it for yourself.

---

## About EnterpriseWizard

EnterpriseWizard, Inc. is the leading provider of adaptive Web-based business process management solutions for organizations of all sizes. Our suite of pure Web applications includes Service Desk, Customer Support, ITIL, Change and Asset Management, CRM, Sarbanes-Oxley, Government Compliance, and general business process automation. Our company has attracted over 300 customers from industries with vastly different needs, ranging from startups to Fortune 100 companies such as Chevron, Merrill Lynch, NEC, Conde Nast, Emerson, Fujitsu, and Carestream Health.