



Systems Thinking & Technology

Customer Relationship Management

12 Slides...

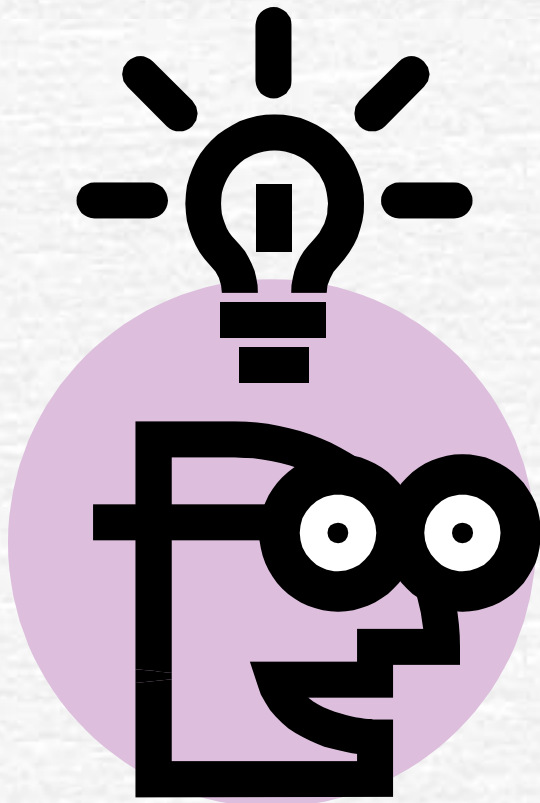
- Talk about a bit of history.
- Talk about the appropriate technology for the neo-Collaborative model.
- Talk about how we might approach that technology.
- Demonstrate a basic use of that technology.

System Thinking - Ah Ha!

- It wasn't about the "Contact Database" at all...
- ...it was about our relationship to our customers & stakeholders.



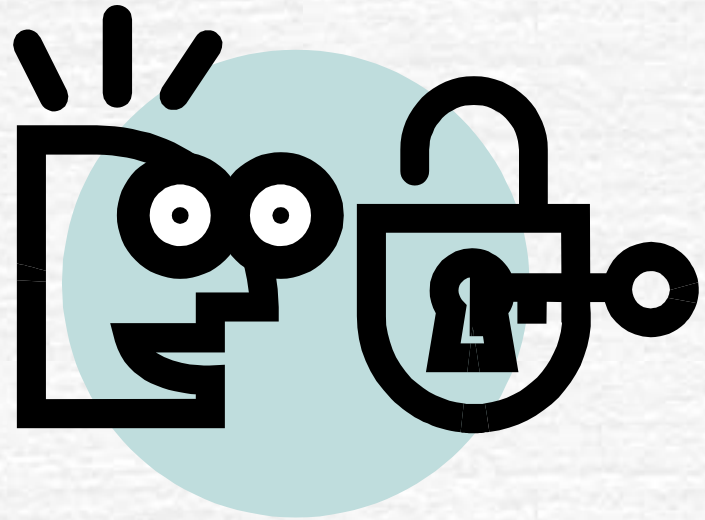
An Idea Forms in My Brain...



- We needed a customer focused technology to fit our new model.
- That technology was Customer Relationship Management

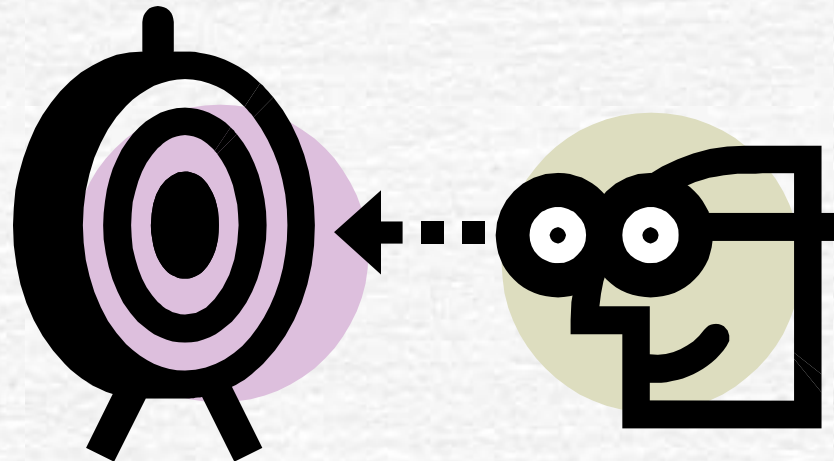
What is CRM ?

- CRM is the business strategy that aims to understand, anticipate, manage and personalize the needs of an organization's current and potential customers.

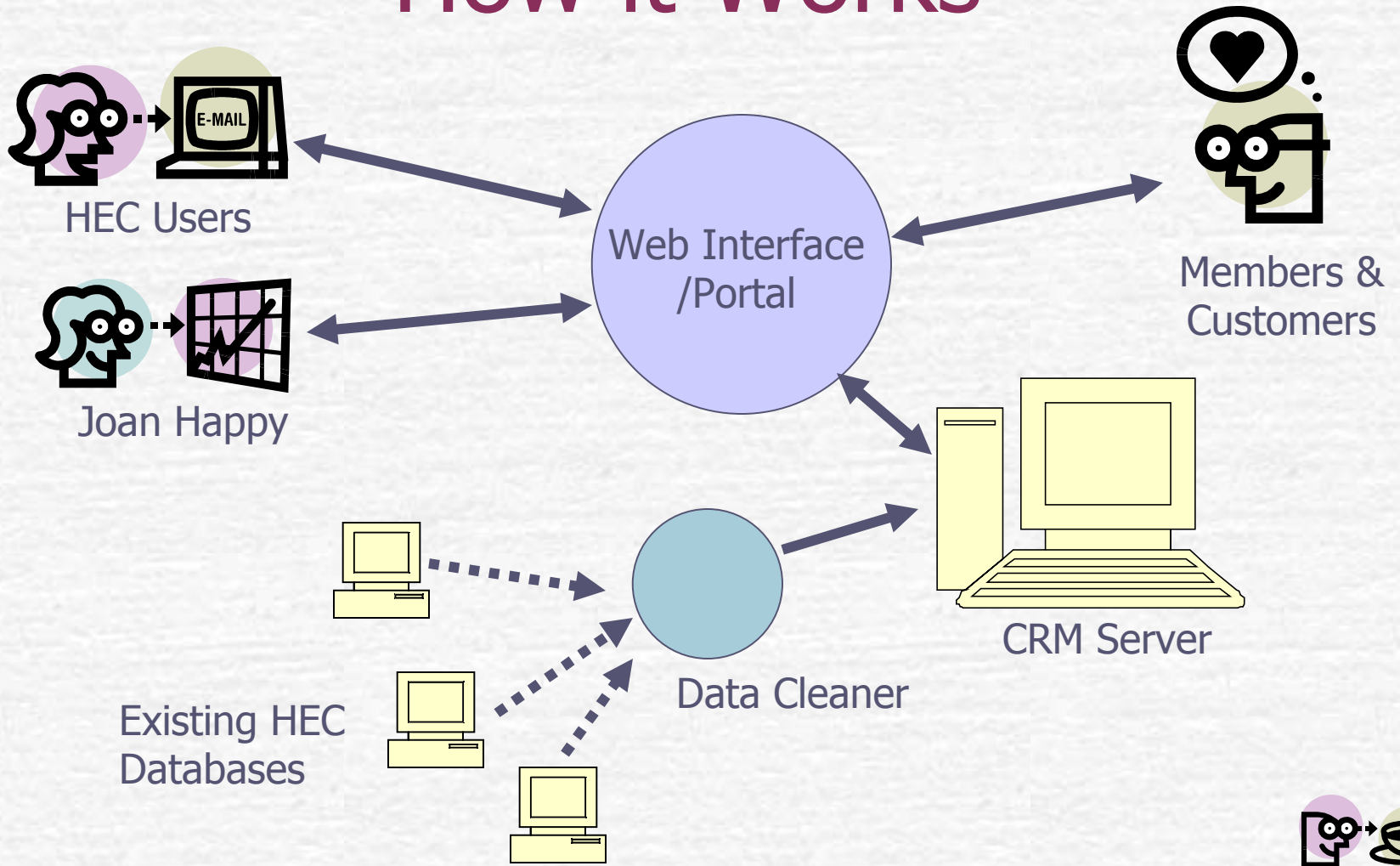


CRM Technology

- CRM is more than just a piece of software...
- CRM is a business strategy, one that puts the customer at the heart of the business.



How it Works

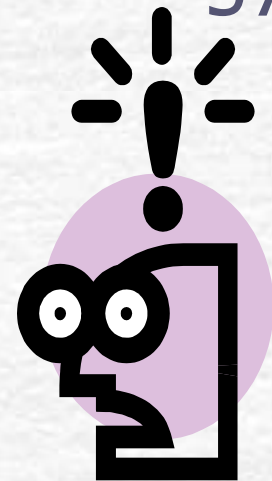


The Use of CRM

- A successful CRM implementation will allow the Collaborative to have a holistic view everyone of our customers.
- This will enable us to:
 - Make quick, informed decisions
 - Measure marketing effectiveness
 - Deliver personalized Customer Care.

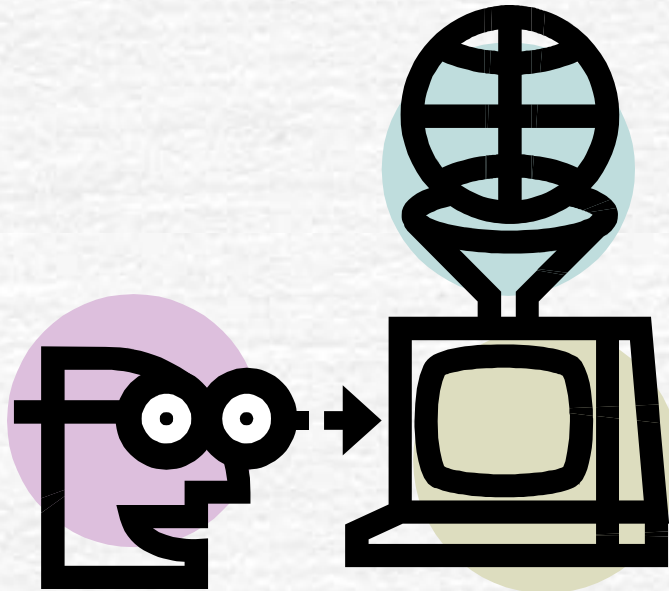
Where to Start

- Successful CRM *always* starts with a business strategy which drives change in the organization and work processes.
- This strategy is enabled by technology.
- The reverse rarely works!



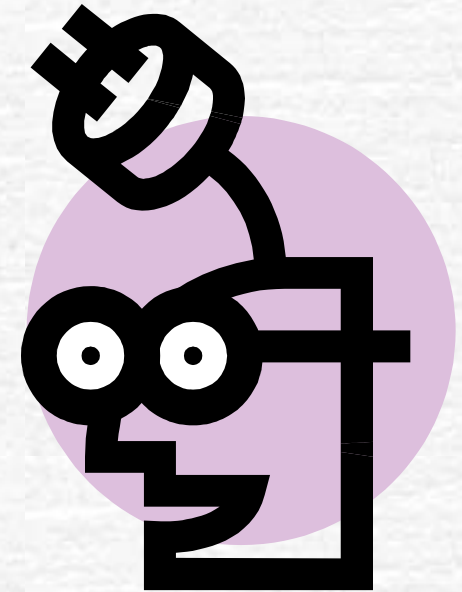
Remember

- Customer Relationship Management is about *people first* and *technology second*.



Power to the People

- The power of this idea lies in our System's Thinking model; harnessing the potential of people to provide quality services and to create a greater customer experience.
- The technology of CRM is simply the enabler.



Next

- Demo of SugarCRM
 - Contact Information Module
 - Full Range of Modules
- Handouts
- Questions?

