The Insider's Guide To CRM Selection: Get Control Of Your Business

Ensuring That Process Automation is a Business Accelerator, Not a Roadblock

Business process automation is a primary driver of many CRM implementations. Large or small, your business can benefit dramatically through process automation, increasing performance and predictability and reducing costs.

How many processes should your business examine with an eye to automation? 10? 100? 1,000? Most organizations, according to industry analyst Gartner, have between 600 and 1,000 processes in need of examination. More often than not, these processes cross departmental boundaries, which can hamper your journey on the road to automation.

Business Accelerator?

If you are like most companies, one of your first reasons for looking at a packaged CRM solution is to ease the burden of process automation. Industry analysts agree that CRM software can give you a head start on automation, because the solutions are designed with an understanding of CRM strategy and include pre-built processes that reflect industry best practices.

But as we all know, one size does not fit all. A CRM solution can give you a beneficial starting point for process automation, but if you have to call in a programmer to make modifications, what appeared to be an accelerator for your business will soon become a roadblock.

While most CRM solutions offer automation of basic repetitive tasks, others take process automation to the next level through workflow designers. The right level for you will depend on the complexity of your business. The trick here is selecting a solution flexible enough to accommodate your processes. The CRM solution needs to provide software the way you want it, rather than forcing you into the vendor's worldview.

Below are four insider tips to help you differentiate among the business process automation capabilities of CRM solutions.

Quick Actions

Your CRM solution should allow any user to automate a series of steps in a repetitive task. These quick action automations should be as simple to create as spreadsheet macros, but are much more powerful, able to streamline for you the mundane tasks of day-to-day system usage.

Quick action automations are especially powerful for sales users, because the less time they spend updating the CRM system, they more time they can spend selling. A sales user, for example, can create a quick action to automatically schedule a follow-up phone call two days after leaving a voicemail. Instead of opening up an activity reminder, selecting the appropriate type of activity, selecting the appropriate date on the calendar, and saving the activity, the sales user has condensed these steps into one quick action. If he can save the quick action on a personalized side bar for one-click access, even better.

Streamlining Sequential Processes

Your CRM solution should also provide an interface to access business rules, so you can modify existing process automations or create your own from scratch. Look for solutions that offer a point-and-click wizard to guide you through the editing or creation of business rules.
This is important because, as the dynamics of your business change, you want the ability to tune your processes quickly and affordably.

You may, for example, want to create a business rule that initiates a series of automated tasks when a customer has not been contacted within 60 days. Before customer contact, the salesperson is assigned a pre-activity task to research the customer's portfolio performance. The sales admin is assigned a task to schedule a call with the customer, which appointment appears on the salesperson's calendar. After the scheduled appointment date, the salesperson is sent a post-activity task to follow up with the customer, leveraging an out-of-the box communication template.

The ability to define and tune your own business rules for process automation is critical. Make sure your CRM solution can clear this hurdle with easy-to-use tools. If you need to rely on a programmer to code customized business rules, your CRM implementation costs can ratchet up quickly.

Designing Complex Workflows

Depending on the complexity of your business, your process automation requirements may be more than a business rule wizard can handle, requiring a workflow designer.

For example: A lead comes in from the Web site, triggering a business process to score the lead based on the prospect's survey responses. If the responses meet certain criteria, a Web service calls out to a data agent to get more detail from Dunn & Bradstreet. The lead is augmented with the new information and is now tagged with a higher rating and assigned to the appropriate salesperson for follow up. The CRM system guides the salesperson through the sales methodology of the opportunity stages, allowing advancement only when certain activities have been completed, thus ensuring greater predictability through the sales cycle. Criteria in the opportunity could then trigger the need for additional resources to either close or service the account. In this scenario, a business rule is triggered to investigate the human resources system to identify the skill set and availability of the required resource. This information is appended to the opportunity record, and the opportunity closes with a positive outcome. Then, a configurable time period after the opportunity has closed, a follow up activity is triggered, reminding the sales person to check on the progress of the account. If the situation warrants, the salesperson is now prompted to promote upsell services.

This type of advanced business process automation capability is rarely found in midmarket solutions. A handful of smart vendors, however, are realizing that midmarket company business models can be as complex as those of large enterprises and are including advanced automation capabilities in their medium enterprise solutions. Be sure your CRM's business process automation capabilities can scale with you as your business grows.

Crossing Enterprise Boundaries

At the most advanced end of the process automation spectrum is the ability to automate processes that cross the boundaries of your enterprise and touch your partners or supply chain vendors. For example, a life insurance company may require a blood test for policy holders to qualify for certain rates. Your CRM solution should be able to trigger a Web services call to an outside vendor to initiate the action of getting the blood work completed, then automatically send back the results to be captured in the appropriate record within the CRM system.

Again, this type of advanced business process automation capability is rarely found in midmarket solutions. But if you want to future-proof your CRM investment, look for solutions that offer these capabilities today. In today's global economy the requirement to automate processes with partners and suppliers could be just around the corner. Don't be blindsided. Get ready to accelerate.

Next, Volume III: "The Insider's Guide to CRM Selection: Gaining an Integrated Customer View without Breaking the Bank," coming soon.

The more easily your customers can do business with you, the greater your competitive advantage. How do you get there? An important step is connecting customer and sales data with other enterprise systems for a complete view of your customer, helping you deliver a smooth, consistent, and positive customer experience.

If you are like most companies looking for a CRM solution, you want to integrate your front office – sales, marketing, and customer service – for a more complete customer view. Don't assume, however, that because a vendor is offering each of these applications they are actually integrated. You'll need to look a little further here.

Because customer data resides in other business systems, you will need to look beyond the front office and focus some attention on whether the solution can integrate with external data sources as well …

If you found this information helpful, you may want to access the previous volume of the "The Insider's Guide to CRM Selection" series, "Volume I: Ensuring High Adoption Rates with Cost-Effective Configuration."

About FrontRange Solutions

FrontRange Solutions USA Inc. provides CRM solutions used by more than 130,000 companies and over 1.7 million users to automate and manage customer-facing initiatives. GoldMine is designed for businesses that want a complete and customizable solution that manages every aspect of the customer lifecycle with a quick time to benefit and low total cost of ownership. For more information, call 800.443.5457 or visit www.goldmine.com.

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