What is *Customer* Management?

Definition

The simplest definition of customer management is simply "how a company manages its customers". However, this simplicity belies the far reaching nature of the subject and the enormous effect that adopting a full CRM programme could have on your business. Jym Tyrell of Ford Europe says,
"CRM is a mindset within the organisation. You have to view it as a change to the way you do business. You need a committed view, which will take time. CRM isn't about a two year project, but a ten year one with a big pot of gold at the end of it".
Bob Mendleson certainly has a view to adopt this mindset in that he also believes that Customer Obsession is more than a soundbite, it goes to the heart of business activity and process.

For a more theoretical definition we could work with 'A proactive process of managing customers and prospects against their needs and their value to you'– It's a two way deal, managing customers is more than just being nice to them, it is also about generating margin and not to put too fine a point on it, the level of resource we put into management depends on the level of return we will get out. One this is understood it is clear that CRM is just as relevant for corporate, intermediaries and direct end consumers. We may use a different mix of channels and strategies to handle corporate customers (as opposed to consumers), but the key concept is exactly the same.

From the customers' point of view, we could also define CRM as "how customers manage their suppliers". Today's marketing, sales and service technologies have given customers so many ways of managing suppliers that we clearly mustn't forget to see things from our customers' viewpoint.

Why do we bother with customer management?

Why can't we carry on doing business as we have done for years? The main reason is that progress with marketing, sales and service technology means that it is now possible to manage customers – or to allow customers to manage us – much better. There are many examples of big changes in market share achieved through use of these new technologies – Easyjet's call centre and their web-based service, Direct Line's invasion of the motor insurance market in 1985, Tesco and Sainsbury's entry into banking using call centre and database technology. In many business to business markets, call centres and web-based marketing have revolutionised business. All over the world, a wave of change is passing over companies. Of course, customer management standards do vary from country to country, as does, for example, the use of customer management technology. Still, all over the world, companies in a given sector are facing broadly similar customer management challenges.

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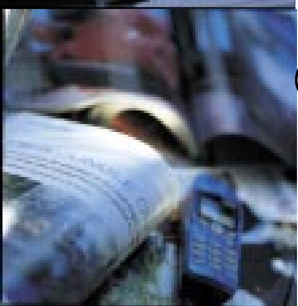
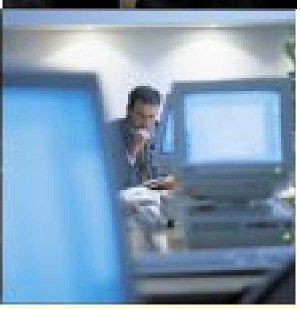
Just because it is possible to change **doesn't mean you have to**. But when competitors start gaining market share, or cherry-picking your best customers, it's time to improve customer management. Of course, there is no simple customer management cookbook telling us when and where to focus – if we were to write one, it would be out of date within a year. Just take mobile phones. At the time of writing, many big companies were examining how they might use the mobile phone or similar wireless technology to improve their customer management. For example, grocery foods firms will be able to send coupons to buyers when they are in stores. These coupons would be only valid for an hour. So within just over an hour, a company would know whether its campaign had worked. Contrast this with the usual three months or so development to measurement cycle of a classic direct marketing campaign. All we can do is to keep such developments under close observation and continually adjust our thinking about what is possible – and what is profitable.

It isn't just competitive threat, of course. Using new approaches to customer management can help cut costs, enhance revenues and improve the customer experience.

Like many 'marketing fashions', CRM has aroused suspicion that it is little more than costly hype. In order to test some of the claims put forward on its behalf, QCi carried out an in-depth evaluation of the marketplace. You may remember from the introductory video that the goal was to see how far – or indeed whether - business performance is related to how well a company manages its customers.





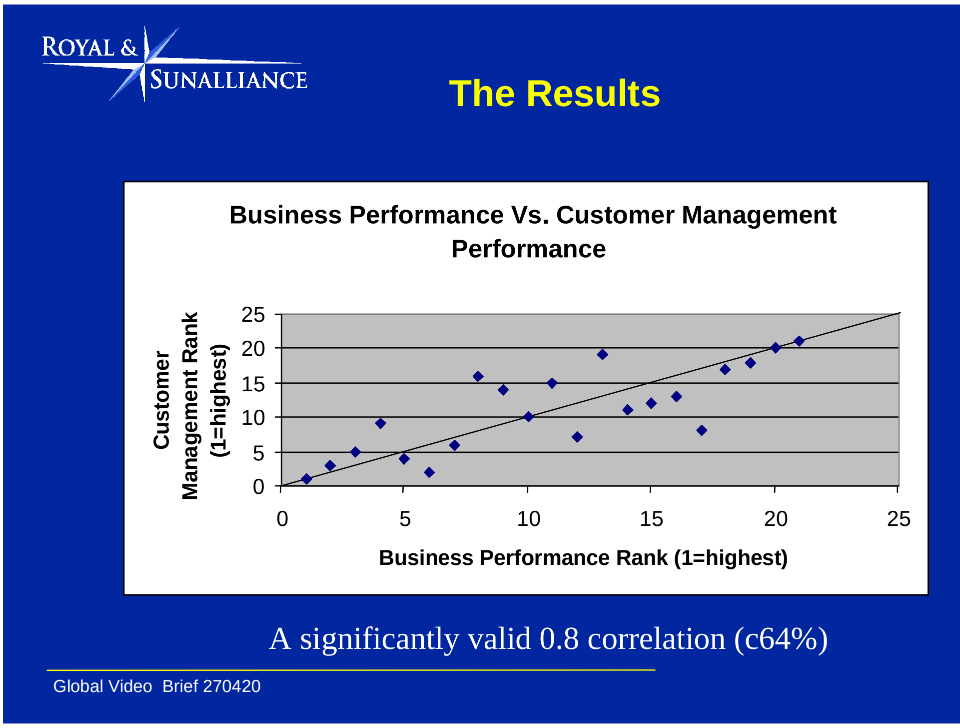
The study

True business performance can be hard to pinpoint. To get round this, a number of independent expert panels were appointed (this allowed checking for consistency between panels) to agree on a definition of successful business performance. These then rated companies, were correlated against the results of a formalised customer management assessment (CMAT) and the key areas of customer management as seen in your model. E.g. analysis and planning, technology etc.

The Result

In terms of size, each of the assessed companies would be considered to be in the top 500 companies in Europe and had multimillion marketing budgets.

NB for full details of this study and the CMAT process visit the QCi website



Scatter gram of overall CRMAT rank versus Business Performance rank

What is *Customer* Management?

An overall correlation result - between performance and CRM score - was calculated at 0.8. This is a very powerful correlation. Although this cannot prove a causal link between the two, they are closely linked and the business interpretation is simply that:

> Companies who manage customers well using sensible, observable, well-implemented business practices are very likely to be good business performers. Conversely, companies that do not set up good customer management practices are likely to be poorer business performers.

Incidentally the most important elements are:

People – Having the right leadership, customer management competencies, people with clear objectives related to customer management and well managed suppliers.

Measurement – regularly measuring actual performance against specific customer behaviours, not just high-level financial targets **and** having the policy deployment processes in place to action the results from the measurement.

CRM (customer management) Activity - Implementing some sensible customer management practices such as targeting high life time value customers, managing enquiries well and quickly, welcoming new customers and proactively monitoring the initial transactions with your company, handling complaints well and learning from them.

You will notice IT is not in this group. It's an important finding and puts IT in its position as a facilitator. You can't do it if you don't have it, but having it will not in itself deliver good CRM.

Customer management doesn't just happen.

You will understand from the above that Customer management doesn't just happen. How a company manages its customers (or allows it to be managed by them) is the result of various activities.

These include:

- **Deciding which customers should be served by the company, whether they should be managed actively or not, and if so how**
- **Understanding customers' current and likely future needs – in general and in relation to interactions between the company and the customer – before, during and after the sale**
- **Understanding what competitors (direct or just competitors for the customers' budget) are doing to serve customers**
- **Understanding what it costs to manage or "serve" customers**
- **Developing propositions which appeal to customers and which allow us to manage them profitably, or them to manage us profitably, while giving the customers real value**
- **Making plans to manage customers, so as to meet customers' needs as well as the company's objectives**
- **Implementing the plans through people processes systems, etc.**
- **Measuring results and evaluating them.**

In these respects, customer management is like any other management activity, requiring a mix of good

The CRM Heritage

In customer management, customer data is used to group customers to allow them to be managed in a limited number of segments with significantly different offers for each segment. This model has been adopted by many companies and in this course, we focus primarily on, how and why it works, and when it does not. In order to understand the CRM model, you need to understand where the model came from.

The heritage of the CRM model lies principally in three areas of management knowledge

- Marketing and sales, including account management
- Direct marketing
- Customer service and quality

Let us look at each of these in turn.

The marketing and sales heritage

This heritage is based on the idea of aligning a company to meet the needs of target customers. The alignment is based on a structured analysis of the company's market environment – the needs of customers, how they are met by the company and its competitors, and also the wider political, economic, social and technological environment. Customers in particular are analysed into particular market segments. The idea of marketing planning is that through this analysis, a company's optimal marketing strategies and policies can be determined – coverings its products, prices, distribution and communication channels, and its implementation and control processes. This is then translated into selling approaches – whether "push" – in which the customer is targeted for sales action, or "pull", where marketing communications are used to motivate the customer to "step forward" and enquire about the product. Once the customer has been "won", account management techniques can be deployed to keep the customer and develop more value. These involve diagnosing the full range of the customers' requirements for products, service, etc., and agreeing with the customer the additional products and services which would meet these requirements. In some cases, a segmented account management approach is taken, with different types of sales approaches and people used to deal with different types and sizes of customer.

The strength of the marketing approach is the tough logical approach it brings to decision-making. Its weaknesses include:

- The full process can be expensive and time-consuming; so that by the time marketing plans are produced they are irrelevant, particularly given the speed of change in markets
- The process can easily become bureaucratised, with specialist marketing planners producing plans, with other staff having no motivation to implement them
- The approach tends to bring general solutions to large customer segments, when a more targeted approach might produce better results
- The approach makes little allowance for what is now called "permission marketing", in which customers tell companies how they would like to be marketed to, or transparent marketing, in which customers actually manage companies.

The CRM Heritage

The direct marketing heritage

Direct marketing is a very close relative of CRM, and indeed most CRM analytical disciplines came straight from direct marketing. Before we examine this heritage, please note that direct marketing is not the same as direct distribution. Direct marketing is simply when a supplier contacts a customer directly. However, direct marketing is used extensively by companies that sell through intermediaries – insurance companies, airlines, automotive companies, grocery product suppliers, industrial products companies. Indeed, direct marketing is a classic "pull" marketing technique for such companies. It is often (mistakenly) considered that as direct marketing technology improves, it is better for product suppliers to "disintermediate" their distributors and distribute directly to final customers. While there have been some notable examples of this in many industries, in general intermediaries perform very valuable functions for both suppliers and customers, such as giving customers a broad range of choice, providing local service, etc. In many cases, distributors do this work much more cheaply than product suppliers, either because they can deliver large volumes of customers in one location (e.g. grocery retailers), or because their cost structure is better (e.g. local distributors of industrial products). In general, intermediaries are vulnerable to intermediation when they fail to add value to both customers and suppliers. Note, however, that in the Web world, many of the really successful companies are intermediaries.

Recognising that supplier and intermediary both have legitimate long-term roles in customer management leads directly to the idea of partnering in customer management. This can be interpreted either in a limited sense e.g. sharing customer data (provided that it is within the terms of data protection legislation), joint promotions, or full partnership, in which supplier and intermediary develop a shared approach to managing the customer – visible in the automotive industry.

The strength of direct marketing usually lies in its accountability.
If there have been weaknesses they lie in:

- an overemphasis in the short term, accountability rather than long term return
- a lack of emphasis on the awareness effect of direct communications
- a lack of understanding of how DM works
- a lack of skills and a high degree of outsourcing of direct marketing, while usually leading to much better performance, can reinforce this weakness.

The customer service and quality heritage

Customer service ideas have contributed heavily to the development of CRM, yet in many companies the customer service function is very poorly integrated with CRM. This is perhaps because in many companies the focus of service has been on resolving or avoiding problems while containing cost, rather than protecting and developing customer value. However, this is changing, and in many companies customer service is seen as an integral part of CRM.

Customer service is delivered in many ways, in many places – whether face to face in the customers' home, office or factory, over the telephone, in a company branch or store, or over the Web. In most cases, people deliver service (whether as a first or as a last resort). Setting and then ensuring delivery of service standards by many staff through many channels has always been one of the major challenges of service. This is where the idea of quality comes in. If you cannot specify what needs to be delivered, the processes by which it should be delivered, or measurements of whether it has been delivered, then it becomes hard to manage. Hence the idea of trying to specify service (or indeed marketing or sales) processes. However, the variety of knowledge, skills and requirements that exist in both customers and your own staff may mean that quality techniques must be combined with different approaches to staff management (e.g. empowerment), so as to achieve required levels of service.

CRM, customer loyalty, satisfaction and value – myths and legends

Loyalty schemes

One of the areas of CRM endeavour most visible to customers is the loyalty scheme. In many countries, such schemes are used by suppliers such as retailers, credit card operators, travel companies (particularly airlines) to reward their customers for continuing to buy. However, as our understanding of how these schemes work grows, it has become pretty clear that although customers may willingly take the rewards on offer, they do not necessarily reward companies with more of their business. This brings us to the alternative justification of some loyalty schemes – that it is only through the scheme that the customer can be induced to declare who they are, and to give further information about what they buy. This applies particularly to businesses where it is not necessary that the supplier knows exactly who the customer is (e.g. airlines and retailers). Whether this is worth doing depends upon whether the information can be used to develop more value, and whether this value is greater than what it costs to collect the information. In some markets, loyalty schemes have become no more than "promotional continuity programmes" – extended incentives to buy, not generating any permanent loyalty.

1.2 Defining customer loyalty

For this reason, it is important not to confuse customer loyalty with loyalty schemes. Customer loyalty is a state of mind, which can be expressed in many ways, most of them beneficial to the supplier e.g. buying more, buying more profitable products, staying longer, recommending.

But achieving and often measuring loyalty is the issue. What can you do to stop 'customers behaving badly'? For a while, Customer Satisfaction has been held out as the answer. But this is not the whole answer.

For instance Research indicates:

"Between 65% and 85% of customers who defect say they were satisfied with their former supplier" (Fred Reichheld - HBR March-April 1993).
A Rockefeller Foundation study (Griffin, 1995) on why customers leave their suppliers found that 68 percent left 'for no special reason'.

This suggests that many customers, in fact a majority, leave because of benign neglect. For many businesses, a sale is a sale. Make one sale, move on to the next one. Never mind what the customer might want or need beyond the sale.

The link between customer satisfaction and loyalty

At Lexus, the consistent winner of satisfaction awards, surveys are not considered the best measure of satisfaction:

'The only meaningful measure of satisfaction in this industry is repurchase loyalty'". Satisfaction scores in the US automobile industry are typically around the 90% yet repurchase is only about 45%. (Dave Illingworth, the first general manager of Lexus)

Satisfaction ratings do not tell what percentage of customers stay loyal and for how long. Remove any of the artificial restrictions detaining customers and only the completely satisfied customers may remain loyal. When satisfaction increases so does loyalty, but the relationship is neither linear nor simple. To prevent customers defecting means that companies must go beyond satisfaction.

To keep them – and develop them – it would appear that you need to DELIGHT them as well.

Customer value – present and future

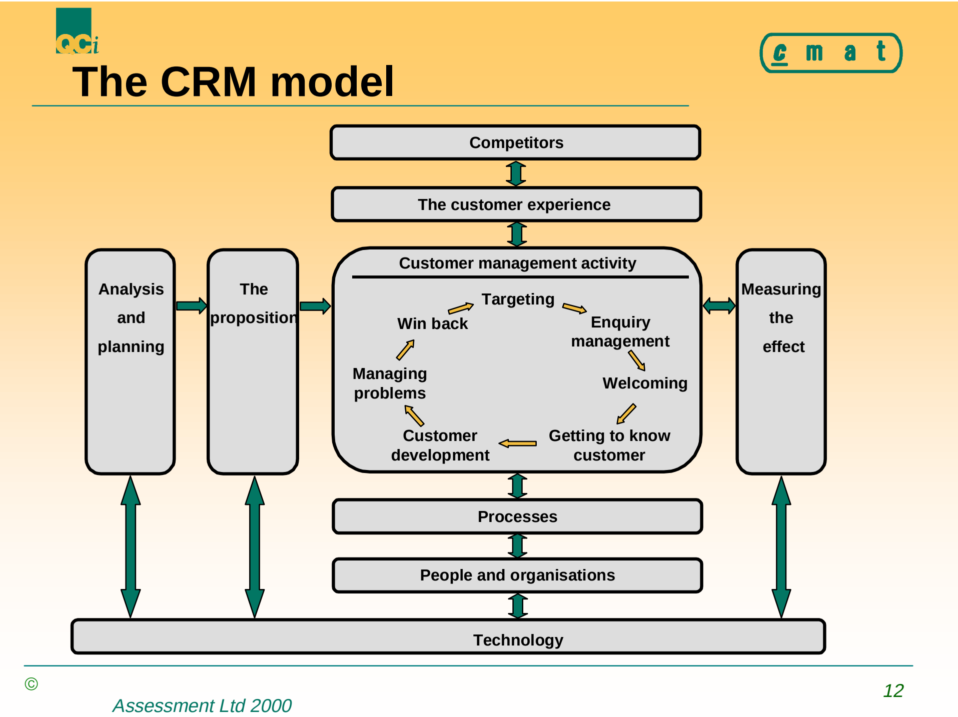
There are many similar myths about customer value. For example, the term "lifetime value" is used glibly, as if it is easy to predict, and also as if it is easy to manage customers by their future value as opposed to their current value. Both can be done, but it requires pretty sophisticated data analysis techniques, and even more sophisticated customer management processes. We therefore suggest that managing customers by future value (**where "future" refers to forecastable value**) is a more realistic target. Developing the capability to manage customers by their future value involves having

- Relatively simple indicators of where future value is likely to differ from current value
- These indicators present at the point where the customer is being managed
- Some simple rules about what to do when it does – rules that can be understood and acted upon by staff.

The CRM Framework

At the heart of this course is our adoption of the QCi model of Customer Relationship Management. We believe that it is the most comprehensive model currently in existence and if you don't currently have an adopted model use this one – it should cover all of the major areas and issues you are likely to encounter. If you do already have a model of CRM then we would hope and expect that it will fit with this.

This model will be the basis for the training course and we will cover each section in detail through



Analysis and Planning

Everything starts with understanding the behaviour, attitudes and values of different customers and customer groups. This understanding is partly derived from internal information sources such as your customer database and partly derived from external sources such as your customer intelligence systems. This will drive more questions, which in turn will refine the research programme. Once the learning process has been started it is possible to plan for acquisition, retention and penetration of the market effectively (REAP). Without it you cannot possibly hope to develop or run a Customer Relationship Management programme.

The Proposition

This enhanced understanding will help define the proposition to each customer group and plan the appropriate value-based activity. I.e. different propositions for different value groups. Having defined the proposition it should be communicated effectively to both customers and to the people who will deliver it. This will include all our suppliers and intermediaries.

Customer Management Activity

These plans and objectives will then drive activities through the whole of the customer life cycle. Since we are concerned with customer relationship marketing, it is worth remembering that relationships differ as they develop. We do not treat old friends in the same way as new friends. Relationships also have different durations and in business terms, relationships have different values. The marketing relationship needs to vary according to the stage and value of the relationship.

In the diagram, this is represented by a cycle, targeting, enquiry management, welcoming, getting to know, customer development, managing problems and Winback. Each of these stages needs to have formal strategies, plans, processes and measurement, if they are to have meaning. Overall the model targets the right value prospects and then tries to convert their interest through a sustained enquiry management process. When they become customers you welcome them and then get to know their interest and needs through data collection. As they become established we will be able (through the firm base of welcome and the information of GTK) to cross sell and upgrade, delight and retain. I.e. selling and non-selling activities. And finally we need to be able to effectively manage problems and should they leave have a process to win them back – or at least those customers that we would have liked to retain. Throughout Customer Management activity, we need to continually apply the key concept of value. We don’t manage all customers the same, because they are not always worth the same to us.

People Process and Technology

People deliver this activity and are supported by leadership and by the support structure. The support structure may be real or virtual, insourced or outsourced. Crucially, all members of the support structure must understand and accept the shared values required for customer relationship management and be measured and rewarded against CRM KPI’s. They need the competencies to do the job (in this context) and therefore probably further training.

Processes are managed within a quality system that encourages both the continuous improvement and step change. Our suppliers may manage some processes for us. This may take a conventional commercial form or be based on closer relationships such as partnering or strategic alliances.

Technology supports all the above and enables the structures, collection and effective processes of data to meet the fully defined business process. Information is acquired and managed in such a way as to be kept up to date. At the heart is a requirement for a single view of customers, their purchase behaviour and contact history.

The Customer Experience

Customers experience both our products and services and those of our competitors. We need to understand how these experiences change attitudes and behaviours and therefore need robust customer experience research at all key 'moment s of truth'.

Measurement

A useful way of determining the direction of progress in each of these areas is to measure it. Developing the right metrics for some of these elements is not easy but the measurement of values, knowledge, process efficiency, profitability and customers' attitudes underpins our vision and objectives. It enables managers to judge levels of success and failure. Feeding back success and failure into the analysis refines and redefines our plans and future activity in a continuous improvement loop. Again without the right measures you will not be able to manage our CRM process. Defining these measures is often our first challenge.

Making progress in customer management

Making progress in customer management requires adherence to some solid general management approaches, and as you will see from the above cannot be achieved simply through installation of a new system, or a clever process. All of the above areas will be effected, but below we emphasise some specifics:

Customer management strategy

- As a company develops and tests in customer management strategy, its other marketing strategies (product, pricing, channels, marketing communication etc.) will need to be revisited so that they support its approach to customer management.
- The changes may be evolutionary in some areas (e.g. advertising which also promotes its way of doing business), revolutionary in others (e.g. customer-configured products and services).

Enabling infrastructure

- Companies should determine how their chosen model(s) need to be supported by systems, data, processes and measures.
- Companies should recognise that these too will evolve as their model of customer management evolves. This implies:
  - Systems which are not designed to be the solution that ends all solutions, but ones which are more flexible, communicating with and updating each other e.g. using middleware.
  - Data which improves in quality, but which may also change in scope.
  - Processes which improve over time, and which are where possible self-improving as the company understands more about how its supply chain works to meet the needs of your intermediate and end-customers.

People

- Of course, without these the whole edifice collapses, although there is a clearly discernible trend for large organisations to try to leverage the skills of a limited number of people across a global market. The move towards e-business and international call centres clearly makes a company less dependent on having skills in one location. However, it seems that many companies oscillate between trying to improve customer management by process transfer and by people transfer. In some case, this is done implicitly rather than explicitly. As the job of the relevant manager is usually to advocate, create and run a new approach, it is therefore unsurprising that failure often occurs. The skills and talents of an advocate are usually poles apart from those of a project manager (who creates the new approach), while a project manager may not be the best person to run the new approach. To use a simple analogy, would you use the engineering team that designed and built a new chemical plant to run it?

Customer management programme

- This should be developed as a series of projects that implement the company's approach to customer management in different domains, for different purposes, at different stages of the customer relationship cycle.
- Many of these projects will have similar objectives to current customer management objectives e.g. retention of good customers, more efficient customer acquisition, delivering quality service while reducing costs.
- However, some projects will be radically different e.g. the e-agent, the customer of the future.
- Companies should recognise that this programme will continue to change as it makes progress with customer management.
- In general, we recommend that detailed planning more than a year on may be inappropriate, so an outline plan for the second and subsequent years may be more appropriate.

Implementing Customer Management

Big Bang or Steady progress

In our customer management work over the last 15 years, we have identified two basic models of project planning for implementing customer management, as follows:

- Big bang – moving as rapidly as possible to implement customer management principles across the business. This in general only works for "green field" businesses, where there are no existing practices. It is very rare, and normally only works in direct-only businesses, where strong central control can be used to ensure implementation. Even many direct-only businesses are product oriented and have not succeeded in implementing customer management as they planned.
- Steady progress – moving steadily towards a customer management vision, while recognising that the vision will continue to change. For larger companies, often with a background of several customer management initiatives (some succeeding, some not), and usually a mixed history of relationships between marketing and IT people (especially in the area of data warehousing projects), this is usually the better option. However, it requires very strong project management disciplines as a series of projects are rolled out across the business, often starting with pilots to establish possibilities, capabilities etc., before rolling out a customer management activity to the rest of the business. It also requires some tough choices to be made about where to start, and where not to, and indeed whether parts of the business should be left untouched. It is this model which is used as the basis for the rest of this briefing.

Steady Progress is right for large corporates

The “steady progress” model is best visualised as a multidimensional diagram. This is how it looks when only two dimensions are shown – in this case business unit/product and customer value group.

		Business units/products				
		A	B	C	D	E
	Current high value customers					
Customer group	Future high value customers					
	Other customers					

A key decision facing the company is how to combine breadth (doing something “partial” across the business) and depth (doing something “comprehensive” in part of the business). These terms are of course all relative – the essence of change management! In order to define these terms, we need to indicate the possible scope of change i.e. what other dimensions are there to CRM projects.

One set of dimensions relates to the business area or activity. It includes:

- Business unit
- Product
- Customer group (however defined e.g. by need, value, growth, affiliation, behaviour)
- Geography e.g. area or branch (this refers to the company’s organisation, not necessarily a geographical group of customers, which would be a customer group as below)
- Function or other organisational sub-division e.g. sales, customer service, claims, or department within function e.g. call centre within customer service
- Communications channel e.g. mail, outbound telemarketing
- Distribution channel (not only which channel to focus on, but also what level of channel e.g. in an agent managed channel, concentrating on agents rather than final customers)
- Relationship stages e.g. targeting, welcoming, cross/up-sell, retention

The scope can also be defined according to particular capabilities or enablers, often relating to infrastructure e.g.

- Data (focusing on a subset of the data required for customer management)
- Systems (focusing on some of the systems required for customer management e.g. specific software, a new type of call centre)
- Market research and analysis (focusing efforts e.g. understanding customer profitability, future customer value)

Although in an ideal world decisions on focus for the second group should be the outcome of decisions about the first group, in practice issues such as feasibility and speed might dictate compromise. Using these definitions, a breadth project could be customer retention across the business, or targeting high (current and/or future) value customers across the business. A depth project could be a complete change to the customer management approach for high value customers in one channel for one product (i.e. to include cross-sell of all other products).

Why is it so important to map out the programme in this way?

Here are the main reasons:

- Because the learning created as a customer management project rolls across the company is highly transferable but takes time to arrive. Rushing ahead means doing things without exploiting potential learning.
- The approach generates explicit attention to learning/knowledge management, ensuring that the relevance of lessons is identified and that relevant lessons are transferred quickly.
- Also, the infrastructure requirement can be identified and planned more securely using this approach. In many companies, some of the required systems, products and services have already been identified, but the direction in which the weapon is to be pointed has not.
- Success generates a demonstration effect – rather than being asked to buy in to change as an act of faith or based on business case analysis, managers can see the results.
- Financial benefits arrive more securely, in line with the investment.

This approach should not be confused with the idea of "low hanging fruit". In our experience, such fruit is sometimes left hanging low because no one wants to eat it. It is a mirage, which looks easy but on closer examination proves to be very difficult. Cross selling to the existing customer base is one such. Many companies realise, after attempting this, that it has not been profitable. A common reason for this is that there is a poor match between ideal customer profiles for the products in question (perhaps they are typically bought at different life stages).

However, cross-selling can be very successful if done properly i.e. using business intelligence to identify which existing customers are appropriate (in terms of life-stage, propensity to respond, need matching to product etc.) for cross-selling. Then, cross selling becomes a very positive first step in showing the value of business intelligence in helping companies understand their customers (and implicitly, the cost of not using business intelligence). This requires proper planning. However, this does not mean that it takes a long time, as most of the data comes from internal systems. Later, more sophistication can be added e.g. adding financial data on customer profitability for each product. This increases the profitability of cross selling.

Another key part of this programme planning methodology, as with all project planning, is that the inputs, outputs, accountabilities, timings, costs and benefits of each project and sub-project should be clearly identified from the beginning. The approach is more secure but more complicated than the big bang approach because rather than an extended period of preparation followed by implementation, many projects and sub-projects require inputs from other projects and provide outputs to other projects over an extended period. An important implication of this project planning methodology is that the projects which are started first are the ones that require the most significant changes e.g. to processes, systems, marketing strategies etc, as it is usually these projects on which later projects depend. This is another reason for avoiding the idea of the low hanging fruit.

Only after a company's history of previous customer management projects, current and future marketing and strategic priorities, and organisational issues is understood can it be suggested:

- Which products/divisions the pilot projects should apply to – though in some cases this will be obvious e.g. retention needs to be applied where attrition is greatest
- Which dimensions should be used to restrict the scope of each project (other than those implicit in the title)
- The timings of each project
- The interdependencies – this is because this can only be done when each project is defined in detail, which also partly determines timings

Being there and getting there

Many customer management programmes fail because companies do not understand that getting to a situation where they are able to manage customers is one thing, continuing this as a way of life another. The former is very much a programme management issue, involving risks, high tolerance of failures, and the like. The latter is a question of disciplined process management, similar to that visible in the best direct marketing companies. The two are different and need to be managed differently.

A key part of the process of getting there and being there is to know where you are. Because customer management is a broadly spread responsibility, it is often difficult for senior managers to answer questions such as “How well are we managing our customers?”, or “Where should we improve our customer management?”. That is why it is important to undergo a regular health-check or customer management assessment, about which more later in this course.

Your role in Customer Management

This introductory module has made the point that customer management, and in particular CRM, is based upon some soundly established principles developed in related discipline areas. It is not rocket science. Its aim is very simple – to focus on getting more value from customers by helping them get more value from your company. Customer management is a mix of hard and soft disciplines. Systems are important, but people equally so. Success is never guaranteed, but it is certainly helped if staff whose work has any effect on customers start to understand what customer management is, how and why it works, and how it affects the roles and accountabilities of them and their colleagues. This is the purpose of this course.