

# CMAT™ PROCESS EXPLAINED

## The Basics

The CMAT™ Assessment is carried out by trained and accredited assessors who are experienced CRM practitioners within QCi or one of its partner organisations. Based on over 260 questions covering the whole of the QCi model of Customer Management, the Assessment has been carried out in over 600 organisations globally.

The screenshot shows the CMAT™ Assessment software interface. At the top, there is a navigation bar with tabs for QUESTION SETS, ASSESSMENTS, REPORTING, QUESTION NAV, PROGRESS, and MAINTENANCE. Below this, a red banner indicates the current assessment: CMAT V4 Za B (dimension version) / C - Air New Zealand. The main question displayed is: "5. Recognition of acquisition/retention/development" with a sub-question: "Does your marketing planning activity give explicit input to your customer management planning in terms of Retention, Efficiency, Acquisition and Penetration?". Below the question, there is a section for "Intention" with a dropdown menu and a list of radio button options: "Full commitment and detailed plans" (selected), "Full Commitment and some plans", "Full Commitment but no real plans", "Some commitment and some plans", and "Little or no commitment and plans". At the bottom of the interface, there is a status bar showing "1. Overall assessment / 1. Analysis and planning / 1. Customer management strategy" and a score of "Score: 450 out of 751". A red message states "This question has not yet been answered". Buttons for "Assessment", "Set to NA", "Save", and "Cancel" are visible at the bottom.

Each question in the assessment describes a “best practice” which effectively defines what companies probably should be doing in customer management. Each question is supported by compliance text help to the assessor and a growing knowledge-base of what best practice looks like in many different business sectors.

As an example, a CMAT™ *question* in Analysis and Planning asks whether a company knows why its high value customers defect (or become dormant). The *compliance* text for the question will explain what the assessor should look for here, and the *support* information will contain examples of how other companies do this, and why. Answers will be recorded by three categories; Intention (does the company plan to do this); Reality (does it do it today); and Effect (does it use this to drive the business).

A ‘scoring based on evidence’ approach is taken to answering each question and a broad range of people, from senior directors to operational level practitioners are interviewed. The gathering of evidence is vital to the reliability of the CMAT™ assessment. As can be inferred from the answer options, the approach is specifically designed to identify clear plans, real delivery and an identifiable effect of each of the practises questioned. The assessor will seek evidence that the “practice” really does happen in the organisation. In this way the all too common gap between senior management perception of the situation and the ‘sharp end’ reality is often identified.

The output of the assessment is an extremely practical report that positions the organisation against a relevant benchmark of other organisations, identifies their areas of strength in CRM and provides detailed recommendations and examples of areas of potential improvement. This output is often integrated with any existing Organisational plans for customer management improvement.

The benchmark is shown as an overall % and quartile positioning against other companies. In addition, a detailed breakdown of the various areas into which the Customer Management model is divided is provided. Typically between 50 and 100 prioritised recommendations are identified by the assessor through careful analysis of the results.

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# CMAT™ MODEL EXPLAINED

## The Approach

The CMAT™ methodology involves a six stage process normally over the elapsed time of 4-6 weeks.

### 1. Planning

This starts with a half day briefing session for the assessor from a senior person or team within the organisation. During this session they establish the current 'perceived' stage of development in CRM, key business issues and any initiatives that are underway. They will also agree the list of individuals to be interviewed and identify the material to be covered in the review phase.

### 2. Review

The assessor will review all of the background material provided. This typically includes marketing plans, research material, satisfaction surveys, literature, web sites and more.

### 3. Interviewee Preparation

A briefing pack is distributed to all the people within the organisation who are to be interviewed. This will explain the objectives and approach for the assessment and what they need to bring to their interview session. The briefing pack is followed up with a phone call to book the interview.

### 4. Interviews

Typically, 5 to 6 days of interviews are carried out at relevant locations. Each interview is structured by the assessor to cover the topics relevant to the individual but is more engaging than a simple question and answer session. The assessor will be looking for clear evidence to support the answers given. Interviews last between 60 and 90 minutes.

**Assessment planning**

**Material review**

**Interviewee preparation**

**Interviewing**

**Assessment report**

**Feedback workshop**

### 5. Report Preparation

A detailed report is prepared by the assessor based on the information and evidence collected in the interviews. The report will cover:

- An overall score against best practise and a management summary
- Scores and a summary report against each element of the Customer Management model
- Comparisons, at a detailed, sub-section level of your performance against a relevant benchmark
- A quartile positioning for each area based on all the assessments on the CMAT™ database
- Recommendations, ranging from tactical to highly strategic, identified by the assessor during their interviews.

### 6. Feedback Workshop

A half-day feedback workshop with the management team to facilitate discussion of results and agree a top level, prioritised action plan agreed by all.

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