

Have Your Employees Participate Proactively When You Prepare for Redesign

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Customer relationship management goes far beyond the implementation of new processes, organizational structures and new databases and systems. CRM touches the heart of the organization: the culture defined by management and lived by each employee. If an organization is not able to transfer a customer-oriented culture—by the way, the most challenging redesign in CRM—to the hearts and minds of its employees, it will be very hard to be successful in managing customer relations.

Unfortunately, most CRM implementation initiatives still focus on the integration of different customer databases to one powerful database to better "control" customer interactions and exploit customer data for more targeted, personalized campaigns. This is one benefit CRM contributes to the company, but is it really a benefit for the customer?

When we ask our clients this question, the reaction is quite surprising. Everyone has understood the "technical" benefits of CRM, but no one has paid any attention to customer requirements and their impact on employee development and performance.

Customer requirements can basically be summarized in three major classes:

- Respectful and kind treatment
- Maintenance of privacy
- Quick and professional responsiveness

Most companies are able to fulfill these requirements through automating workflow, customer data availability and system integration for quick data exchange. But what happens when it comes to a physical interaction with the customer? Are the employees also able to fulfill these requirements when talking to customers on the phone, attending them in a sales visit and responding to a complaint by email? In most cases, the answer is no—not because the employees are not willing to do this but because they are not actively involved in the transformation toward CRM.

We made an "awakening" experience at one of our client projects. The client went for a major CRM implementation program that considered all blueprint CRM success guidelines: defining the CRM strategy/processes and business rules, reorganizing the company's structure toward customer-centricity and selecting a sophisticated CRM technology to support the new processes. But company executives forgot to let employees participate in the new strategic developments: They were introduced to decisions already taken instead of actively participating in them.

Employees were involved only in discussing whether or not data fields and buttons on screens were positioned well when it came to designing the new CRM tool's graphical user interface. The result was that on paper and on the software screens, everything seemed perfect, but the customer satisfaction index did not increase after project implementation. It decreased, and no one was able to explain why. But in truth, the explanation was easy: If employees do not understand "the reason why" of a redesign and are not part of designing new strategy guidelines, processes and other elements, they are not able to deliver it.

Here are some common mistakes companies make about their employees during a redesign:

- **Lack of involvement in defining a realistic CRM approach.** Those employees with the most customer experience are usually consulted for the assessment of CRM, not for defining improvements in processes and business rules. Because these employees are considered operative staff, not innovative, conceptual persons, companies prefer to

contract with expensive consultants for redesigning the CRM landscape. I consider this a mistake: Sure, a consultant brings the methodology and global viewpoint on implementing CRM, but an outsider cannot contribute the crucial internal knowledge of the company's customer and existing weaknesses. This is the first step in the employees taking a passive attitude toward the redesign.

- **Lack of involvement in defining a customer-oriented culture.** When it comes to defining a customer-oriented culture, the focus usually is given to the external customer. Values are defined by management to fulfill customer requirements, such as integrity for treating customers in a respectful and kind manner, confidentiality for maintaining customer privacy and empathy for quickly resolving customer requests.

The question is whether employees would define these same values for a customer-oriented culture. Chances are that if they do, they experience daily issues within the organization that impede the successful and steady application of these values in CRM delivery. Why? Because values also need to be defined for the internal customer: A sales rep is not able to quickly respond to a customer request regarding the last invoice if his colleague from Controlling does not consider the resolution of this request as urgent and focuses on other things.

Involving employees in identifying the process interfaces in CRM and setting customer-centric business rules based on values is the key to ensure a working customer-oriented culture.

- **Lack of empowerment to take decisions in crucial moments with the customer.** Redesigned CRM business rules in most cases still require approval by at least one higher hierarchy in the organization. This is not correct; the objective of redesign should always be "the leaner the better," reducing hierarchies and empowering front-line staff in taking decisions to resolve customer requests according to the values defined within the customer-oriented culture. Otherwise, redesign does not make any sense. The customer feels he is in "good hands," if he sees that any customer-facing employee is able to quickly resolve his request—without having to call his supervisor and/or different colleagues. Obviously, such decision criteria as budget limits have to be considered during redesign.
- **Lack of defining motivation and incentive management.** Last, but not least, employees need to know "what is in it" for them after redesign. If the customer satisfaction index rises, will employees receive a bonus? If a customer congratulates an employee for kind treatment, will this employee be rewarded? If internal barriers in resolving a customer request lead to customer attrition, do the responsible employees need to assume this? And how? Defining these rules within redesign—involving the employees—is crucial for making CRM work.

To put it all into a nutshell, there is a set of things you need to do for your employees when redesigning toward CRM and customer-centricity. And only an integrative, coordinated and involving approach in redesign assures that your employees will be part of it.

The client I mentioned earlier understood this about two years after the "go-live" of the new CRM landscape. Now not only are employees only involved in questioning the decisions made and guidelines set, but also they are actively taking part in CRM delivery: If things with customers go well, they are rewarded with a bonus at the end of the year.



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