

CRM: “for professional use only”

By John C. Checco, CISSP

The makers of XM Satellite Radio have it all wrong. Sure, you can get continuous play of any genre of music (or television audio) without commercial interruptions, but that’s not the point. I like the fact that there is someone live at the other end introducing the songs, adding their spin on the current news and confiding in 40,000 listeners their personal escapades. When driving for extended periods of time, I have a pre-selected set of local radio stations that I can flip through, not to find just music, but the mood of the station jockey. When I can make a connection to that station jockey, I know that he/she will select music that I’ll want to hear. Even the conglomerate stations realize that although most music is pre-determined through computer-generated playlists, they need the station jockeys to set the context so the listener feels comfortable with the song selections and, more importantly, pays attention to the station even through the commercial announcements. Music without context is not only boring, but not a good business model for radio stations.

Customer Relationship Management (CRM) runs along the same lines. CRM provides the “context” which sales, marketing and support people use to increase business. CRM is built on 2 major factors: the sale to and support of a customer.

The Sale

Businesses are always looking for the most efficient way to make new sales. There are reports and magazines in each trade which are always analyzing the “hit” rate on one advertising method over another. For some industries, cold-calling has the greatest hit rate – until the dawn of the “Do Not Call” era. In other industries, it is clearly television/media. (Count the number of automobile commercials within a one hour television slot and compare that percentage against the number of non-automobile commercials in the same period.)

In the end, a prospective consumer usually needs to talk to someone. The best sales and marketing people I have ever met have the same qualities as radio station jockeys. Not only can they make you feel comfortable with their anecdotes and eventually product pitches, they are also great listeners. Real listening includes more than remembering items beyond the current conversation; it encompasses the ability to apply knowledge from one area of a person’s needs to another. This is what current CRM solutions try to emulate. They track not only customer needs, but also unrelated preferences, to make the sales more personal and more attractive.

Customer Support

Much is written about the great exodus of customer support groups to outsourced professionals. (The article does not condone or discourage the trend, but provides insight into making better decisions with CRM.) Let's face it, though, when someone actually needs to call customer support, it is not pretty. What the customer is immediately looking for within the first minute of the phone conversation is three assurances:

- Comfort – assurance that the customer has called the right place.
- Expertise – assurance that the support group has the skills and authority to help resolve a problem.
- Empathy – assurance that the support group understands the implications of the customer's encounter with a problem.

Traditionally the best way provide all these assurances was to either dedicate a limited number of customer accounts to each service professional or to have staff that wears many hats (sales as well as support). Both methods rely heavily on personal experience with the product as well as the customer base. Unfortunately, CRM is viewed as a cost-effective way to "provide" support expertise using either inadequately trained staff or outsourced call centers.

Strengthening the Weakest Link

The weakest link in all this business – even using a CRM solution – has always been people. The definition of "professional" has multiple meanings from the most popular "skilled practitioner; an expert" to the more cynical "one who earns a living in a given or implied occupation".¹

Although professional salespeople can communicate well, great salespeople can relate well. They know which topics to avoid and which to pursue. Great salespeople have strong personalities, which make them memorable; so they often have high rates of repeat customers. These traits cannot be commoditized into a shrink-wrapped CRM solution.

Similarly, professional customer support centers work well according to specified guidelines and can provide tangible results. A great support experience can indirectly lead to repeat customers. Was the customer experience better than satisfactory? How is satisfaction measured? Does the customer support center explicitly ask the customer about satisfaction, or do they measure implicit indicators like:

- the number of phone calls during a problem resolution,
- the number of phone transfers during a single support call,
- the number of escalations during a given period,
- discernable change in customer attitude – positive or negative – during the course of a conversation (or during the course of the entire problem resolution),
- the number of politeness indicators ("please" and "thank you") during a support call,

- the amount of “small talk” during a support call.

CRM solutions cannot replace sales intuition and support etiquette. It sounds odd at first, but before any CRM solution is implemented, good social interaction training (and a bit of behavioral psychology) must occur. The usefulness of CRM increases exponentially to those who have been successful without it because CRM becomes a tool to assist them in a process they already practice. To the other type of “professional”, CRM becomes a crutch.

CRM, as a tool, is Sheffield steel to the professional figure skater: if they have the expertise to skate competitively, it is an edge; otherwise, it is just a hazard.

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¹ *The American Heritage® Dictionary of the English Language, Fourth Edition*