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Cloud CRM: The Politics of Data Ownership and Control

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As I've written previously, CRM systems are inherently the most political of Enterprise systems. Users' bonuses and even their career paths may be riding on the data values in the CRM system. Small errors in the data can mean big problems if leads are getting lost or sales reps can't see relevant information about their customers and prospects.

But this isn't just an issue of data quality: even the semantics can get pretty political. What does it mean to be a qualified lead? What are the entry criteria for an opportunity stage? What's the meaning of the "amount" field? You wouldn't believe some of the hair-splitting arguments we've listened to.

In playing umpire in these arguments, we have to be sensitive to the specifics of our clients' organizational, business processes, and sales channel needs. But here are some general rules that apply to nearly any B2B marketing & sales company:

• The opportunity object is almost always the exclusive domain of sales, sales support, or operations. The areas of endless debate are the sales stages, forecast category, probability, and close date. While other groups (particularly accounting/finance and marketing) can have opinions and requirements of the data, the sales organization gets to make all the decisions about the meaning and quality standards about this record.

There are some exceptions and amendments to this rule. In large organization, the opportunity may be opened by an "account development" or "inside sales" group that is not part of the field sales organization. In these cases, the conditions under which an opportunity is opened — and therefore the meaning of at least one of the opportunity stages — will be defined jointly by the sales and account development teams. In other large organizations, the final closing of an opportunity is done by an order operations, finance, or distribution/fulfillment function. In these cases, the sales rep moves the deal into a "signed" opportunity stage, but the "closed won" or "fulfilled" stage definition is under the control of other departments.

Finally, for organizations leveraging ecommerce, the ecommerce team will have their own sales stages and different interpretations for the opportunity data. This is the reason for the "sales process" feature in your CRM system, if it has one.

• The Account object, on the other hand, really can't be owned exclusively by anyone — even though everyone thinks they do. In most CRM systems, the account is near the top of the object model, so the creation, updating, merging, or deletion of accounts can have surprising effects. Consequently, the definition and semantics of the account record may include input from the partner organization, customer support, operations, marketing, and of course sales.

In a large organization, however, the final arbiter of "what's an account" may be accounting/finance, because they own the customer master in their systems. Even so, other organizations need to be able to create an account under certain circumstances where the company does not exist in the accounting system. For example, an e-commerce system will need to be able to create an account in order to create and execute an order — but this may be happening at 3 AM on a Sunday morning, hours or even days before the account is officially established in the accounting system. Further, the marketing and telesales teams need to be able to create accounts as part of the lead-conversion process — and those accounts may need to exist in the CRM for months before they appear in the accounting system. In Salesforce.com, this is handled with the record type function, but every CRM system handles this a little differentity.

- The contact object has similar ambiguities, as everyone in the company needs to access and create them. Fortunately, contacts are less messy because they aren't so pivotal to the object model of most CRM systems. Almost always, the "owner" of the contact object definition can be split between sales and customer support. Unless there's a good business reason to do otherwise, the split should be even between the two organizations, with marketing having a smaller vote to act as a tie-breaker.
- Leads can be a surprisingly controversial CRM object, but there are some pretty simple rules:

Leads should be divided into at least three categories: "live ones" who've recently and explicitly asked for more information; "names" who are clearly in our target market, but haven't yet asked us for anything (or asked so long ago they're deemed as dormant); and "dead ones" who have been explicitly disqualified or have such low data quality that we

The live ones are almost always the property of telesales, inside sales, or account development. These leads should have the most intensive lead nurturing (vertical-marketing) campaigns and the most sensitive alerts of staleness or inaction. Unattended leads go cold surprisingly fast.

The Names should be the exclusive domain of marketing. The number of names will be at least an order of magnitude larger than the live ones, so they'll be the target for marketing

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automation systems and low-cost database marketing and Web tactics.

The dead ones, surprisingly, should not be deleted from the system (even though marketing and sales usually want to do so). Why? There's a lot to learn about the business process and technical failures that produced the dead ones. Marketing and business analysts are usually the best people to do forensic analysis and recommend process improvements to minimize the dead ones over time.

Fortunately, most of the other objects in the CRM system are a lot more straightforward than those above. But don't be surprised when there's organizational squabbling over the semantics of some obscure field, particularly if it is used to filter reports or fire alert messages.

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