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When Your Customers Vote, Does Your CRM Listen?

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June 28, 2010

Customers vote every day, implicitly through how they prioritize, how they spend their time, and where they engage in transactions (or not). So instead of asking your customers and prospects for an explicit vote, your CRM system needs to listen much more carefully to discern when they have made a choice, and decode what it means about their level of satisfaction.

This means you need to have a much more systematic way of tracking and managing customer/prospect responses across several departments. The core technologies you'll need: a CRM system, a marketing automation system, a Web content-management system with good Web analytics, integration with your ERP and customer support system, and probably a data warehouse. But as I wrote previously, all of these systems will be rendered nearly powerless if you don't have a consistent way to identify your users and prospects. It's not good enough to tally by segment: your systems need to attribute the series of choices and votes to individuals.

People won't register or give you any good identifier information unless they think you are halfway relevant to their interests and believe you are trustworthy. Classically, the best way to get user identification info is to start very small, and ask only for the prospect's e-mail address in exchange for something of value. Initially, ask the user to opt-in only to a relevant newsletter — do not ask for a blanket opt-in. Way too many people will opt-out as they're already inundated with junk mail; and because in the low-trust world we live in, people will too often just say no.

Every time a customer or prospect returns to your site to look up a price or download something, they are voting again. In exchange for any detailed request, ask them for one more piece of information, such as state and country. Each time they return, this progressive registration technique gets them to gradually give you a ton of up-to-date information, including their preferences regarding newsletter subscriptions, product interest, etc. Of course, from day one you must respect their privacy.

Much of the mechanics for all this can be handled with a good CRM system integrated with a solid marketing automation system. In addition to the explicit profile-based scoring that sales typically asks for (e.g., "give me just Director and VP job titles"), add the implicit behavioral-based scores (e.g., "add ten points when they watch this video"). But for real voting, summary scores aren't enough. Record the timing and details of each customer and prospect interaction, so you have the time-series detail you need to analyze the voting patterns.

Once a lead is handed off to the sales team, you've got to deal with a new layer of the voting problem. Sales rep interactions tend to be much more personal, so they are poorly documented. Make sure that every customer e-mail conversation is captured in the CRM system (via "auto attach" features like Email2Salesforce), and integrate your phone system so that every dial from the desk phone is instrumented for customer ID, time / date, and length of call. Of course, you can't capture everything automatically (some reps make half their calls from their mobile phone), so make sure there are incentives for the reps to at least record the outcome of every conversation (because that's where the "vote" is).

Once the deal is in negotiation, there's even more opportunity for collecting and understanding how the customer is voting:

• During the closing part of the sales cycle, every quote and contract version is a voting occasion. Record the blow-by-blow detail of these negotiation cycles in the CRM system as a series of documents.

• Once the deal is signed, record when the customer actually installs or starts using your product. Look at the logs of your post-sales support people or your license fulfillment server for indications of activation.

• Measure how long is it before their first support call. Of course, track all subsequent support and call-center interactions, and use a brief customer satisfaction survey at the close of every case.

• How long is it before customers register for training or attend a training Webinar?

• If your product has a call-home feature, have it send anonymous statistics to your CRM system. You'll need to get the customer's authorization for this, but everyone in high tech understands that support engineers need baseline statistics to provide better product support.

• If you have a retail channel, provide ways for the customers to provide you input in real time. If you're flush with budget, you can make an iPhone app for that.

• Set up a voting system in your customer forums and portals. The first step is to set up a simple survey system to ask users questions (offering a small prize for the best response of the week). The second step is a product or service suggestions area (such as Salesforce.com's Ideas feature) to get users to submit and vote on ideas.

Given the number of prospects and voting occasions, it's pretty easy to see the nightmare of trying to analyze every vote sequence. So don't do that. Instead, collect the votes continuously, summarize the trends regularly, but count the votes in detail only when you need to answer a specific question. This means you need to have your data warehouse set up for easy ad-hoc queries, typically using a business intelligence tool.

Think this sounds expensive? It can be. But think about what profit is: Customer lifetime value minus cost of customer acquisition. By listening to customer votes, you encourage more loyalty (increasing customer lifetime value) and improve marketing and sales effectiveness (lowering the cost of customer acquisition). That's a formula even your CFO could love.

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