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# Puredata CRM

Customer Information Management

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## Managing CRM data for B2B Sales Performance

*An actionable plan to get the most from  
CRM data.*

### Who should read this Whitepaper?

- Executive Management Teams
- Senior Sales Management
- Senior Marketing Management
- Senior IT
- Business Teams with an interest in an organisations CRM infrastructure



# Managing CRM data for B2B Sales Performance

*A Puredata CRM Whitepaper*

## **Introduction**

Many organisations have deployed CRM solutions. However, the data that goes into those systems is often an afterthought. This paper is designed to help you understand how you can approach the data issues relating to your CRM.

The data market is now maturing into a combined set of what have previously been disparate business processes. These combined processes are known as Customer Information Management.

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## The Issues

The majority of organizations have now invested in a CRM platform of some sort. If they haven't invested, they are likely to be seeking to invest at some point in the near future.

The value of these systems is directly proportional to the quality of data held within them. Unfortunately, this is an often neglected aspect of CRM systems. Business data typically degrades at 2%-3% per month so even if the data was good to start with, it is likely that within a short time frame, this data will age and will no longer be useful to users of the system. Managing this data is a multi-disciplinary task and typically, sales organizations do not have the time or necessary focus to conduct these tasks effectively.

Implementing CRM systems demands top down organisational commitment and significant investment. If the data within these systems isn't considered carefully at the start, the system may never get off the ground. If the data is allowed to age, then a percentage of users are likely to simply give up using the system. To deliver the enterprise benefits of CRM, usage must be high. To ensure usage, the 'system' must therefore deliver.

In managing the data consideration needs to be given to a number of areas:

- **Business Objectives & Data Fit for Purpose** – Businesses are constantly evolving. However, the data that businesses have on their customers may have been acquired / built to meet business needs years ago. A process needs to be established to evaluate the suitability of an organisations data asset for the business as it is today and into the future.
- **Data Sources & Data Consolidation** – As a result of years of legacy, data is often held in multiple different systems in multiple formats. Because data is held in so many systems it is very difficult for organisations to get a full 360° degree view of their customers.
- **Data Compliance** – Ensuring that data is legally compliant is becoming an increasingly difficult task. There needs to be regular activity for you to be assured that your business does not fall foul of the law.
- **Data Duplication** – Many businesses serve individual customers in a variety of ways. This means that data on the customer can exist on many systems. This creates the impression that your business does not understand its customers. Having duplicate information even in a single system can generate huge costs for businesses.
- **Data Suppression** – Your business should ensure that it is careful who it communicates with. Files exist to suppress for example the deceased and these should be carefully considered and implemented as part of your CRM data strategy.
- **Scheduling & Management of data changes** – Data activities need to be scheduled and managed to cause the least disruption to the business.
- **Address Management** – There are numerous ways to save money through having high quality addresses within your system.

- **Business Process Management** – CRM can feed a number of business processes such as Customer Communications Management, Call Centres and electronic channels. These all need reliable accurate data if you are to leverage the advantages of these technology platforms. If feeding a batch environment, data must be extremely accurate. Business processes such as lead handling also need to be thought through with care, to maximise the potential value of all who communicate with your business.
- **Multiple Data Ingestion Points** – Today, we communicate with customers through a variety of channels. Each of these channels represents a point of ingestion. If your company's data strategy does not accommodate these channels holistically and with compliance in mind, then you will be fighting a losing battle.
- **Types of Information** - Customer data starts with Master Data - the core customer details. However, customer information can become much richer particularly in B2B sectors. Strategies need to be devised to handle the different types of customer information
- **Data Enrichment** – Data starts with raw contact lists provided by the major data brokers. However this is just a starting point. The specific contacts that are interested in your businesses offerings and a variety of other information is what really helps you to build and deliver a high performance sales & marketing organisation.
- **Ongoing Maintenance of Data** – Data does not update itself. To get the highest levels of performance, data needs to be maintained and qualified as a continual activity.
- **Management of Multiple Data Channels** – Not much more than ten years ago, we typically communicated with our customers across only two channels. These were phone and mail. Even ten years ago, the data management challenge was difficult. Today, we can communicate with our customers via numerous channels. The challenge is that the technology which manages these differing channels of communication are built in isolation; again with little regard for the organisational need to manage data at an enterprise level.
- **Supporting sales & marketing personnel with specific information requests** – Successful sales people are busy sales people, meeting customers and devising solutions to their needs constantly. When walking into a new or even an existing customer if the business is not well understood then you are in a position of disadvantage. Understanding customers well is like have a gun in a knife fight. By knowing more about your customers businesses, you are at an advantage and can get ahead of your competitors.

As can be seen, there are an array of distinct processes that need to be managed and administered. There is a significant amount that needs to be considered in managing an organisations sales and marketing data. With the amount that does need to be considered, it is no wonder that so many organisations struggle with the management of their data and land up not seeing the benefits they originally anticipated from CRM. To do all of this and ensure that sales, retention and acquisition targets are met is very difficult.

The evidence here suggests that CRM is not simply a matter of implementing a CRM 'system'. It is a complex, multi-disciplinary business initiative requiring continual management, business objectives alignment and business process improvements.

What should also be understood is that companies cannot expect their sales organisations to do all of this because the organisation would simply stop selling.

## Impacts of a fragmented strategy

Poor data can impact your organisation across its business functions. It is the business equivalent of trying to win the Grand Prix with a flat tyre. Many of these costs are hidden unless you know where to look for them.

But it is not just a matter of managing cost. Effective data management can give organisations a successful uplift and is certainly a key enabler in many business initiatives. Mergers & Acquisitions, increased competition, market share pressure, a desire to sell a portfolio of product or services, maximising the share of the customer wallet and so on. To address many of these issues, data is a fundamental piece of the jigsaw and certainly a key enabler of success.

The issue is that where there is no concerted effort and no master plan, success is difficult to achieve. Tasks that should get done don't get done as other business pressures take precedence. Over time the system and its ability to meet business objectives declines. These tasks only need to be forgotten a few times and it can seem like there is a mountain to climb to get data to the high quality standard it needs to be to run an optimised business.

This is a difficult position for the sales and marketing management team. The benefits of a good CRM implementation are clear. And it is here that we must list some of the likely objectives of a typical CRM implementation.

### Sales Management

- Get good visibility of what's happening and can quickly identify activities that warrant their attention.
- Can quickly analyse markets, regions and territories to assist in making business decisions. This means that sales teams can be better aligned and factors such as market penetration, growth in market etc. can be clearly understood.
- Can quickly understand the status of the business' sales pipeline.
- Can quickly prepare useful reports and other information for business decision making purposes.
- Sales force becomes more effective as a result of ready access to information, effective task management and reporting that provides information that allows them to do their jobs.
- A centralised customer view enhances opportunity to cross-sell and up sell.
- A centralised customer view helps to reduce divisional conflicts in larger multi-product organisations.
- A reliable single source of customer information provides accurate data feeds for downstream processes such as Customer Communications Management, Invoicing etc.

Of course all of these end results are dependent upon:

- System Quality Management
- Provision of high quality, reliable information.
- Provision of enriched information that allows sales organisations to do their jobs effectively.
- High Usage Rates.

Organisations that fail to meet the four key criteria above will get relatively little benefit from their system and can expect that:

- Sales and customer service staff who advocate the system continue to work with it, those that don't walk away and revert to old methods.
- Financial data within the system such as Sales Forecasts become skewed and unreliable and Sales Management are back to the task of ringing around once a week / month / quarter and asking for reports from already pressurised people.
- Large portions of the data age and become unreliable making marketing efforts difficult, unreliable and wasteful
- New people joining the business are at a disadvantage as one of the first tasks that they have to do is rebuild their data. A time consuming task that slows down the period to productivity.

Poor data means that sales people are not able to reach their customers effectively. It can mean that sales people do not know who their potential customers are. Aging data means that inappropriate calls are made to the wrong individual, damaging the perception of your company. Data that is new and hasn't been fine tuned to your organisations means that sales people can spend countless hours, days or weeks trying to find the right contact for your products and services. Reliable, accurate data when combined with specific intelligence about a customers business can give your sales people a major advantage when approaching accounts; yielding competitive strength and a deeper empathy with your customers needs.

Without a 360° customer view, customers can quickly be swamped by the sales activities of your organisation. In larger companies, it can mean multiple sales people calling the same customer, wasting precious time. A 360° view allows an organisation to adopt a co-ordinated strategy with clients, increasing the likelihood that the customer will understand the value proposition that your company is able to deliver.

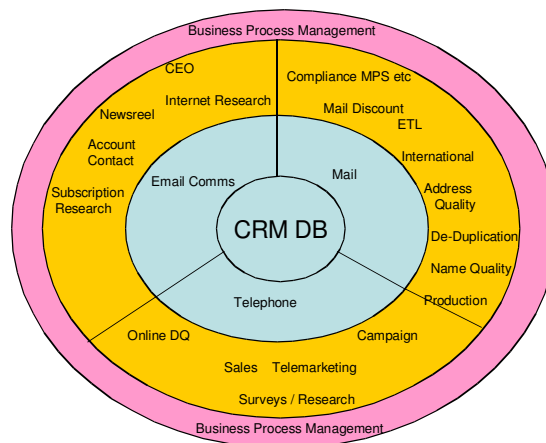
Marketing suffers more than most with poor data. Marketing campaigns may only reach a percentage of your potential prospects. Mail may never be delivered, generating significant costs. Mailing existing customers with bad contact information damages the perception of your company and is likely to incur further costs when that customer contacts the call centre.

If we can imagine for example, a mailing run, with 100,000 mail packets destined for customers. The database has had no direct management for a year meaning that 35-40% of the database has become unreliable.

## Recommended Approach & Action Plan

Organisations need to move beyond tactical solutions. As the information that companies hold about their customers grows, so does the complexity of managing the broad range of data sources.

In examining the market today, it can be seen that the market for Customer Information Management is highly fragmented. Few organisations seem to take a total view of the tasks and undertakings that need to take place to deliver a truly comprehensive customer information strategy.



*Figure 1- Overview of the services required to deliver effective Customer Information Management*

Delivering this total approach requires a strong focus not only on the tasks of data management but also upon the need to deliver a strong project management focus to ensure that the various streams of activity function together and to the same objectives.

To try and deliver this in a multi-vendor environment is very difficult and forces organisations to build their own project management teams to manage this. This is costly, and too often discovery efforts are being repeated in company after company.

Organisations should take an approach that is incremental. Identification of the strategy followed by tactical implementations that fall in line with the strategy is probably the best approach. Trying to resolve an entire organisations data assets in one hit is likely to be a failed approach.

Organisations need to identify partners who offer a broad view of Customer Information Management and that have the experience in understanding a number of key disciplines:

- Assist your organisation in getting senior management buy-in.
- Project Management – Getting the tasks right and scheduled to budget is important.
- Adaptability – Some organisations will benefit from a fully outsourced approach; others will require an on site approach
- Understand the end business objectives
- Able to deliver a multiple approaches to achieving data quality
- Develop a clear idea of the benefits and business opportunities that come available as a result of data improvements.
- Understand the gap between business objectives and the ability your organisations current data has to support it.
- Develop an annualised Data Management plan that embraces compliance, data availability, data transport and data requirements to meet business objectives and compliance.
- Understand your strategy for maintaining data across you IS portfolio
- A range of data services – For some companies and outsourced model is the most effective. For others, an on site installation is more appropriate. There will be a range of services.
- If your business operates outside national boundaries, an ability to support Data Quality at both domestic and international levels.
- Call Centre – A computerised approach will probably get you 70-80% of the way. There needs to be continual effort and supporting business processes to manage the exceptions that software cannot resolve.
- There are many variables to be managed. Effort must be continuous.
- Organisations that provide services need to work closely with, and become an extended part of your own organisation with regular, structured workshops, and an objective approach.
- Organisations that provide services need to understand your business and the sales and marketing challenges that it faces in order that it may correctly align your organisational data and data infrastructure with your business needs.
- Organisations that provide services must be able to take a holistic view of the data across your organisation, understanding its fundamental purposes.
- It is unlikely that one organisation can do everything that you need on its own. However, companies need to keep vendor relationships to a minimum in order to successfully drive strategy. Therefore, the organisation that you choose to work with should be open to working with and managing third party organisations.

It is a relatively easy task to identify companies that can deliver data processing services. It is also easy to identify companies that can deliver a telemarketing service. However, it is very difficult to find organisations that do both with the required business to business focus.

However, too quickly organisations have to manage multiple vendor relationships to deliver their CIM strategy resulting in fragmentation. This approach may yield tactical success but is unlikely to deliver a strategic advantage for companies.

Companies should adopt the following action plan:

- Start planning for the long term. Quick tactical fixes will only deliver short term results.
- Bring the experts in who can take an objective view of your organisation and its needs.
- Establish a project that budgets not just for CRM Systems but the long term maintenance and management of that system and its data.
- Ensure that the organisation you are going to work with is able to deliver a three tier approach – Data Governance, Data Stewardship and Execution.
- Identify the end game but take small steps towards getting there. Small pieces of proof and quick benefit delivery will help make future steps easier to win support for. Large projects will disrupt the organisations “business as usual” status and bring in an increased risk to the chance of project success.
- Form a small user committee. Involve the people that use the system at management, sales and operative levels. A quality Customer Information Management vendor will do this automatically, and will identify the working patterns of these people to ensure the system delivers what they need. This will drive up adoption and usage.
- Achieve a balance between computerised methods and human intervention. Design the business processes to ensure that collaboration between the two approaches is optimised.
- Do not allow the sales and marketing organisation to become disrupted. Keep them doing what they do best – working directly with customers to devise solutions and proposals and close them. The raw information management needs should be outsourced under a service level agreement that achieves consistency and reliability.
- Identify ingestion points and areas where data problems are easily recognised e.g. call centres, email customer service platforms and so on.
- Identify downstream processes that will benefit from data improvements. These can be a significant source for the overall business case.
- Don’t try to do it on your own. There are a host of powerful tools and approaches that have been learned many times before.

Puredata CRM is positioned to help organisations deliver a total Customer Information Management approach. Puredata provides the following services and software:

- Raw Data Requirements identification, sourcing and supply
- Data Consulting – Understand the gap between your data today and where you need to be both today and into the future.
- Data software products that can be delivered either in house or outsourced.
- CRM – We can deliver hosted or in house CRM options via two vendors
- Contact Centre – Our contact centres can help meet a number of business requirements including data hygiene, data enrichment, customer service, event management and promotional activities. All of these are data intensive activities.
- Research – Ensure that the organisation you work with is able to deliver a detailed ongoing customer research capability to ensure that your CRM platform is enriched with the best possible detailed information that is updated on an ongoing basis.

Puredata CRM is both in-source and outsource Customer Information Management provider based in the South East of the UK. We provide product, services and BPO typically to B2B organisations. Formed in 2006, Puredata is a new breed of company whose focus is helping companies with their data infrastructure and fulfilment challenges.