



PEOPLE SCOPE

Management Consultancy
Management Development
Training • Coaching

Must-Do Tips No 19: CRM's Building Blocks

Never let it be said that we are afraid to overstretch a metaphor in a good cause, so here goes. From working with professional firms on Client Care and Client Relationship Management (CRM) programmes, there are a number of absolute musts that can make the difference between success and underperformance. In our opinion, this month's three 'got to's really are the basis of a successful client care infrastructure.

Tip 1 - foundations laid?

We have tried to make CRM programmes work without the right groundwork to underpin them. It's difficult. The first important question when analysing an important relationship is 'Where Are We Now?'. Meaningful current and historical data on the client's revenue and profitability overall and by office, department, practice area, fee earner, client contact etc. etc. (hopefully with comparisons vs. other clients) are usually at the top of our shopping list - and quite often are discovered to be 'out of stock'. Excusing the mixed metaphor for a moment, specifiers of CRM and other databases please note.

Tip 2 - bricks with enough straw

One of the other key issues that client care programmes should address is 'How Well Connected Are We?'. The firm's contacts are analysed for their importance and targeted for appropriate 'attention' so that data can be gathered on their perceptions to provide client care straw. In many firms that we have observed, this gathering task is delegated to internal or external researchers. There's absolutely nothing wrong with this per se, but too often professional staff can see this as an excuse to do nothing themselves. Thus, valuable *ongoing* feedback is not gained. The best CRM-focused firms also train and motivate fee earners at all levels to be their eyes, ears, and straw gatherers.

Tip 3 - co-ordinating the 'trades'

For any good project manager (on a building site or client care), this is vital. Probably, the major benefit of a CRM programme is that departments, practice areas, and offices have to make the time to talk to each other about what they have in common i.e. the client. Frequently, we sit in rooms full of professionals trying to stifle disbelief as they begin to share vitally important information on what they know about the client and contacts in common - often for the first time!

People Scope offers workshop programmes and consulting advice to professional firms on Client Care and Client Relationship Management - for more information, hit 'Reply' and type **CRM**. For more general information about what we do, go to www.peoplescope.com.



We welcome feedback from you on what you think about "Must-Do Tips". If you like it hit 'Reply' and tell us specifically what you like. If there is a topic or issue that you would like us to cover, what is it? And if there's something that annoys, tell us too! We want to improve.

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Best regards.

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