USING CRM TO ENHANCE MEMBER SERVICES
In This Session

- Defining the need for an effective CRM System
- Are commercial systems a good fit for pooling?
- What data your pool needs to enhance and be successful going forward?
- How to implement a CRM system that’s meaningful for your operation
- Other key elements of an effective CRM philosophy
What is CRM?

- Customer Relationship Management Software = Customer Experience Software

- CRM is all about visibility, productivity, business outcomes, and member focus
  - Member Insights
  - Improved Teamwork — Productivity Driver
  - Revenue Planning and Insights — Sales Enablement
  - Tracking Member Needs

- Meets your ultimate outcome: to be a trusted partner to members
What is CRM?
Goal of Any CRM System

- Use technology to unify disparate data sources
- Streamline service management, sales, and contact management
- Get closer to the voice of the member and enhance the member experience
- Offer custom, member-centric solutions
What is CRM?

Proactively offer relevant information and services for better member interactions

Image Source: LinkedIn
Are Commercial CRM Solutions a Fit?

- Modern CRM solutions are integrated suites of software that make it easy to deploy
  - Low cost, risk, and effort

- Largely cloud-based and customizable now
  - Requires less IT expertise to build, configure and maintain
  - New software features can be easily turned on without the cost and risk of traditional “on premise” software
Are Commercial CRM Solutions a Fit?

- Larger providers are dipping down to SMBs
  - Marketo
  - Salesforce Essentials
  - HubSpot
  - Microsoft Dynamics 365

- All integrated with social platforms
Are Commercial CRM Solutions a Fit?

- Some Common Features
  - Customer dBase
  - Account-Based Marketing Tools
  - Data Analytics
  - Contact Activity & Management
  - Web Personalization
  - Blog & Content Creation Tools
  - Social & Email Marketing Tools
  - Events & Webinars
  - CRM Integration
What Are Current Trends in CRM?

- Mining information for a better member experience
  - Member interaction frequency
  - What products and services they use
  - ID content of more successful conversations
  - Promise of more timely and targeted information and services

- Predictive Engagement = Drive personalized conversations using information/solutions they are interested in
What Are Current Trends in CRM?

- Focus on integrating digital marketing and service capabilities into traditional services
  - Newer digital channels and technology are being added to Sales, Service and Marketing apps within CRM suites

- Ex: Marketing Automation Beyond Email Creation
  - Now create, manage and distribute content across multiple channels
Business needs and goals ALWAYS drive technology investments.

Technology enables organizations to know more, grow more, and serve members better.

Ex: Improve operations and increase the spend of current members.
Is It Just About the Technology?

- CRM succeeds when your team engages
  - Involved in shaping the requirements, design and selection

- Adoption by your team is what fuels results
  - Want easier access to the right information so you can reach their goals more readily
  - Ease of use with a focus on making core work more efficient and effective
  - Breakdown barriers causing redundancy and wasted work
Is It Just About the Technology?

- Technology is the enabler to empower employees
  - Technology is not the goal

- Frees up time to focus on the value-add relationship
  - Data at your finger tips so you can engage better
Defining the Member Experience

- Survey the members to define what THEY think their experience is today
  - Preferences
  - What’s different from 5 years ago?
  - What’s satisfying and dissatisfying?
  - What are the key touchpoints the members have with you?
  - How frequently are those touchpoints?
  - How does that compare to the services they get from other vendors they work with?

- Solve for information efficiencies and challenges first
Components in Your CRM Plan

- What’s your organizational strategy? What are the desired outcomes?

- Assess where CRM can positively impact your business and its processes
  - ID the most important member-impacting processes

- What information are you regularly exchanging with members?
  - Data audit

- Estimate the time-cost of people and manual work

- How fast and responsive are you with members today?
Build A Business Case

- **Cost – Cash Flow Impact**
  - Software
  - IT cost to build or deploy CRM
  - Business analysts and other resource costs
  - Consulting fees for technology advice, configuration, and training

- **Benefits – Business Impact**
  - Improved cross-selling and upselling to current members
  - Increased productivity
  - Increased marketing effectiveness
  - Reduced member churn
  - Improved member satisfaction
Are We Too Late?

- Benefits of lagging behind other sectors
  - The tech value is hardened by those before you
  - Learn from their best practices
  - SMB solutions are more readily available now with a full range of pricing options
Digital Transformation

Marketing Technology, deployed well, lets you focus on creativity, collaboration, and execution in alignment with your desired outcomes.

– B2B Marketing Academy
Discussion