A Brief History of CRM

2010: Proliferation of Software Providers.

2010

2000

2000: Cloud-based and Social CRM gain acceptance.

1999: SaaS and Mobile CRM launched.

1999

1995

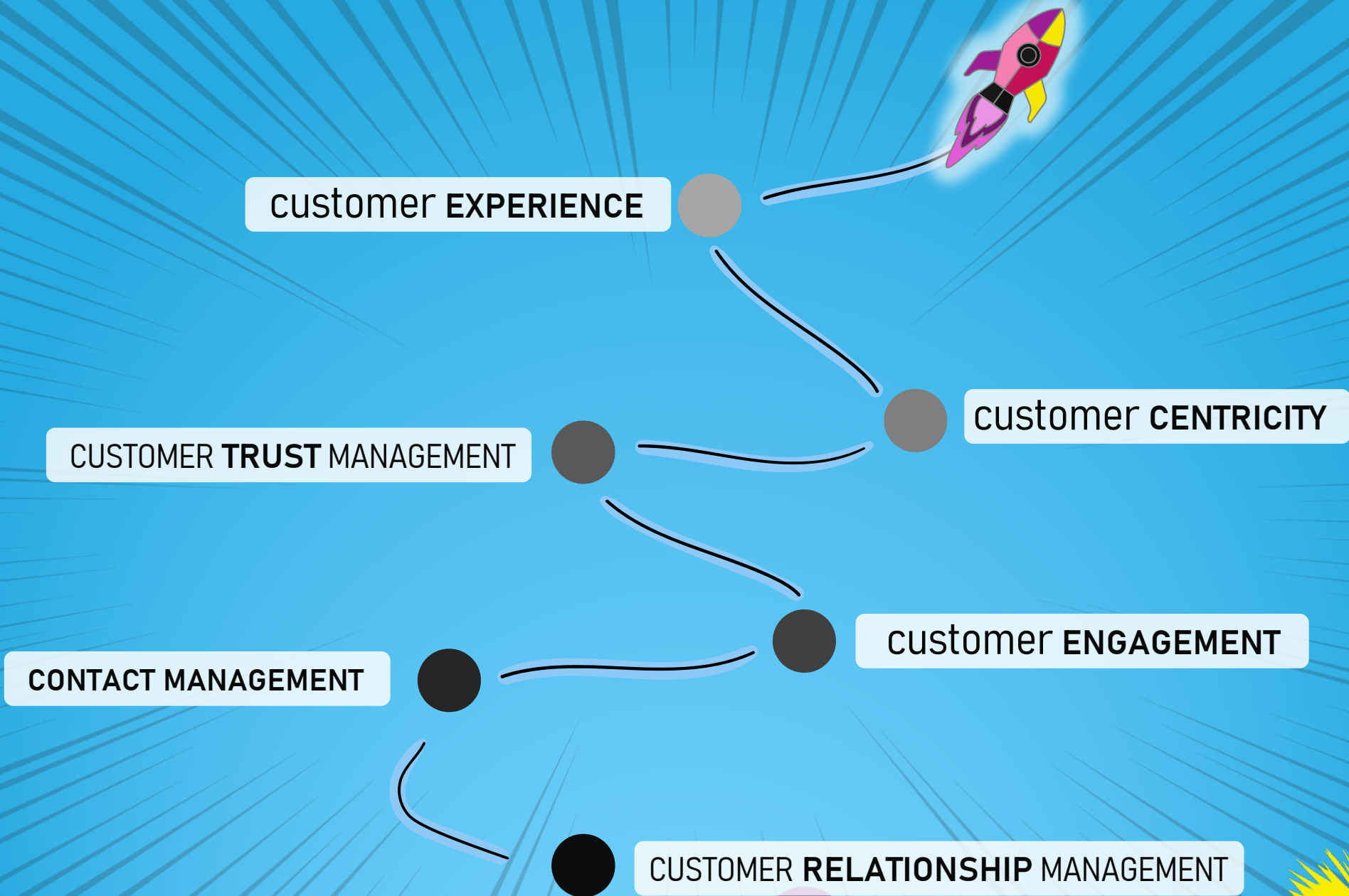1995: The term Customer Relationship Management was coined.
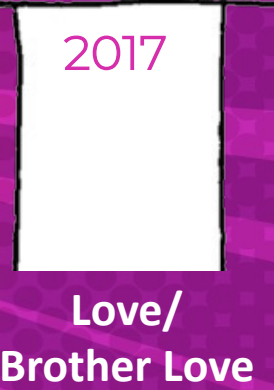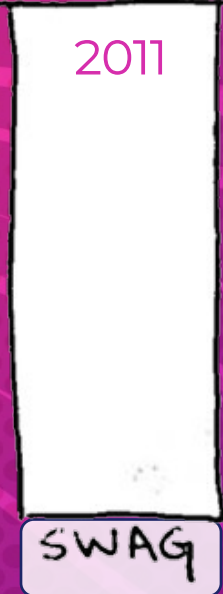
1990: The birth of Sales Force Automation

1990
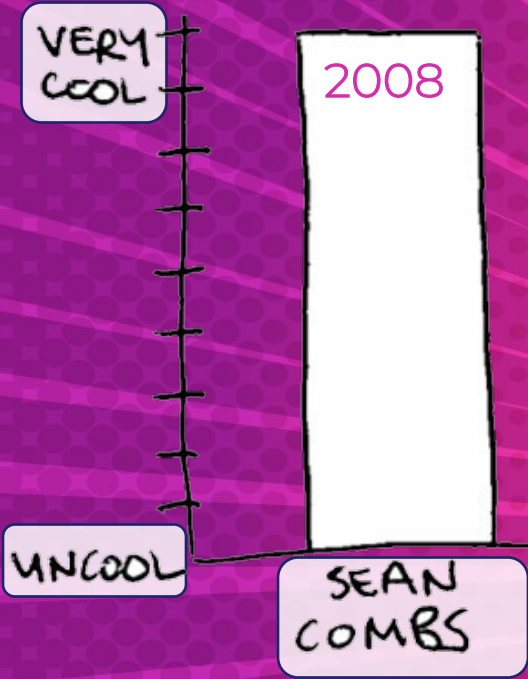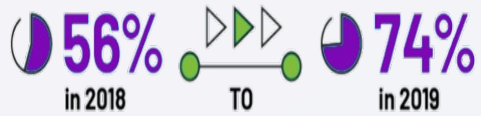
1987

1987: ACT! And the birth of Contact Management Software

the real challenge...

35% Inadequate change management & training

15% No business value.

49% Slow user adoption.

Microsoft

mscrm-addons.com
Your company for MS-CRM ADD-ONS!

purely CRM

POWERED BY DUG
DYNAMICSCON
VIRTUAL

Sources: Stellaxius, Zendesk Sell Blog, Nucleus, Hubspot Sales Blog, Forrester, Trackvia, Bain, PwC

Customer Relationship Management

1. Define & align our value to the RIGHT customer
- Needs, Rewards, Cost, Outcome, Equity

2. Understand characteristics & circumstances
- Characteristics, Circumstances, Capacity, Culture

3. Measure engagement & value co-creation
- Responsiveness, Curiosity, Discovery, Investigation, Value Co-Creation

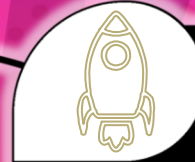4. Sustain Accountability & Ownership
- Responsibility, Willingness, Obligation, Commitment, Ownership

5. Deliver Knowledge & Skills
- Skill, Ability, Mastery

6. Manage Transparency & Trust
- Accessibility, Honesty, Candor, Trust

7. Improve Customer Experience & Loyalty
- Experience, Emotion, Feelings, Context

To Manage **Relationships**, You Must Manage…

Customer Value…

Functionality in CRM System:

- Who are my best customers/customer segments?
- How much value do I deliver to them?
- What value do I give each customer?
- How much time do I spend doing that?
- How do I reiterate my value to customers?
- How do I communicate additional value?

To Manage **Relationships**, You Must Manage...

Customer Value...
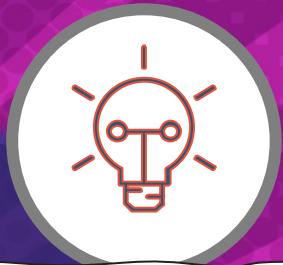
Functionality in CRM System:

My Open Opportunities by Relationship ∨ | Edit columns | Edit filters | Search this view

○	Topic ∨	Est. Re... ↓ ∨	Relationship Health State (KPI) ∨	Relationship Health ... ∨	Account ∨	Time Spent by T... ∨	Time Engaged with Cust... ∨	Last Updated (KPI) ∨
	5 Café A-100 Aut...	$107,500....	● Good	↗ Improving	Trey Rese...	3.3	3.3	
	50 Café A-100 Au...	$95,000.00	● Good	→ Steady	Trey Rese...	0.0	0.1	
	3 Café Grande Es...	$44,700.00	● Good	↘ Declining	A. Datum...	3.3	3.3	
○	2 Semiautomatic ...	$39,800.00	● Good	↗ Improving	A. Datum...	3.3	3.3	
						3.3	3.3	
						0.3	0.3	
						2.0	2.0	
						0.3	0.3	
						0.3	0.3	

My Open Leads by Relationship ∨ | Edit columns | Edit filters

○	Name ∨	Topic ∨	Relationship Health State (KPI) ∨	Relationship Health ... ∨	Parent Account fo... ∨	Time Spent by T... ∨
	Gabriela Christian...	5 Café Gr...	● Good	→ Steady	A. Datum Corpor...	0.5
	Ivan Cashin	15 Airpot...	● Poor	→ Steady	Northwind Traders	0.1
	Lavona Field	15 Airpot...	● Good	→ Steady	Fabrikam, Inc.	0.6

	18 Airpot Coffee ...	$7,182.00	● Good	↗ Improving	Northwin...	3.3	3.3
	1 Café BG-1 Grin...	$4,999.00	● Good	↗ Improving	Alpine Sk...	0.3	0.3
	10 Airpot XL Coff...	$4,990.00	● Good	↗ Improving	Alpine Sk...	3.3	3.3

Relationship Analytics: Auto Capture, Relationship Assistant, and Email Engagement

Functionality in CRM System:

- How do they differ culturally?
- What is the impact of language?
- What is the impact of corporate culture?
- What is the impact of values and worldview?
- Can I be predictive best on customer-specific needs, characteristics, circumstances, and capacity?

To Manage **Relationships**, You Must Manage…

Customer Centricity

Functionality in CRM System:

Functionality in CRM System:

- How much engagement do they expect?
- How much engagement is happening and what does it mean?
- What motivates them to co-create value?
- What is their preferred communication channel?

To Manage **Relationships**, You Must Manage...
Customer Engagement

Functionality in CRM System:

Relationship Analytics: Auto Capture, Relationship Assistant, and Email Engagement

Customer Accountability

Functionality in CRM System:

- Are we meeting our obligations?
- Does the customer believe we are?
- Is the customer meeting their obligations?

Customer Knowledge

Functionality in CRM System:

- Does the customer have the knowledge they need?
- About us?
- About our products and services?
- Do they know where to get it?
- Do we have the skills/mastery they expect?
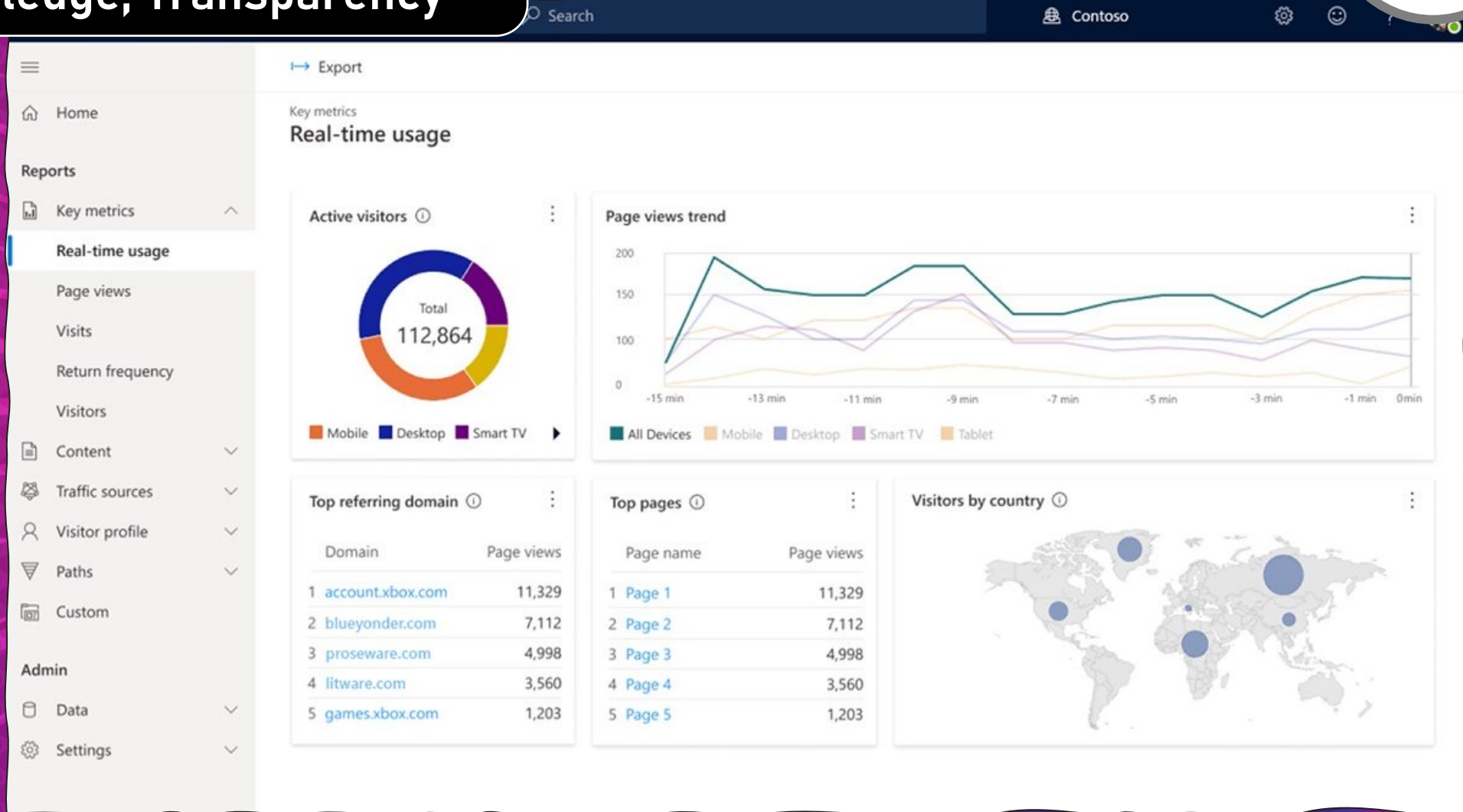
▷ **Customer Transparency**

Functionality in CRM System:

- How much is the right amount?
- Are they getting it?
- What is creating the appearance of dishonesty?
- What is the level of trust?
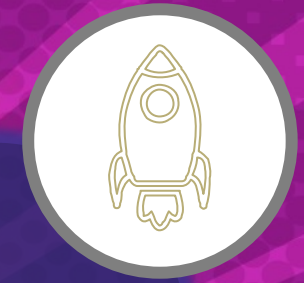
To Manage **Relationships**, You Must Manage...

Customer Accountability, Knowledge, Transparency

Functionality in CRM System:
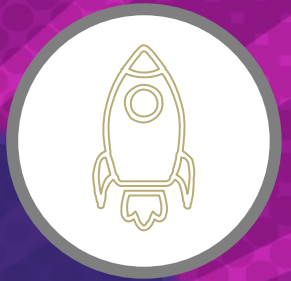
Engagement Insights in CDP
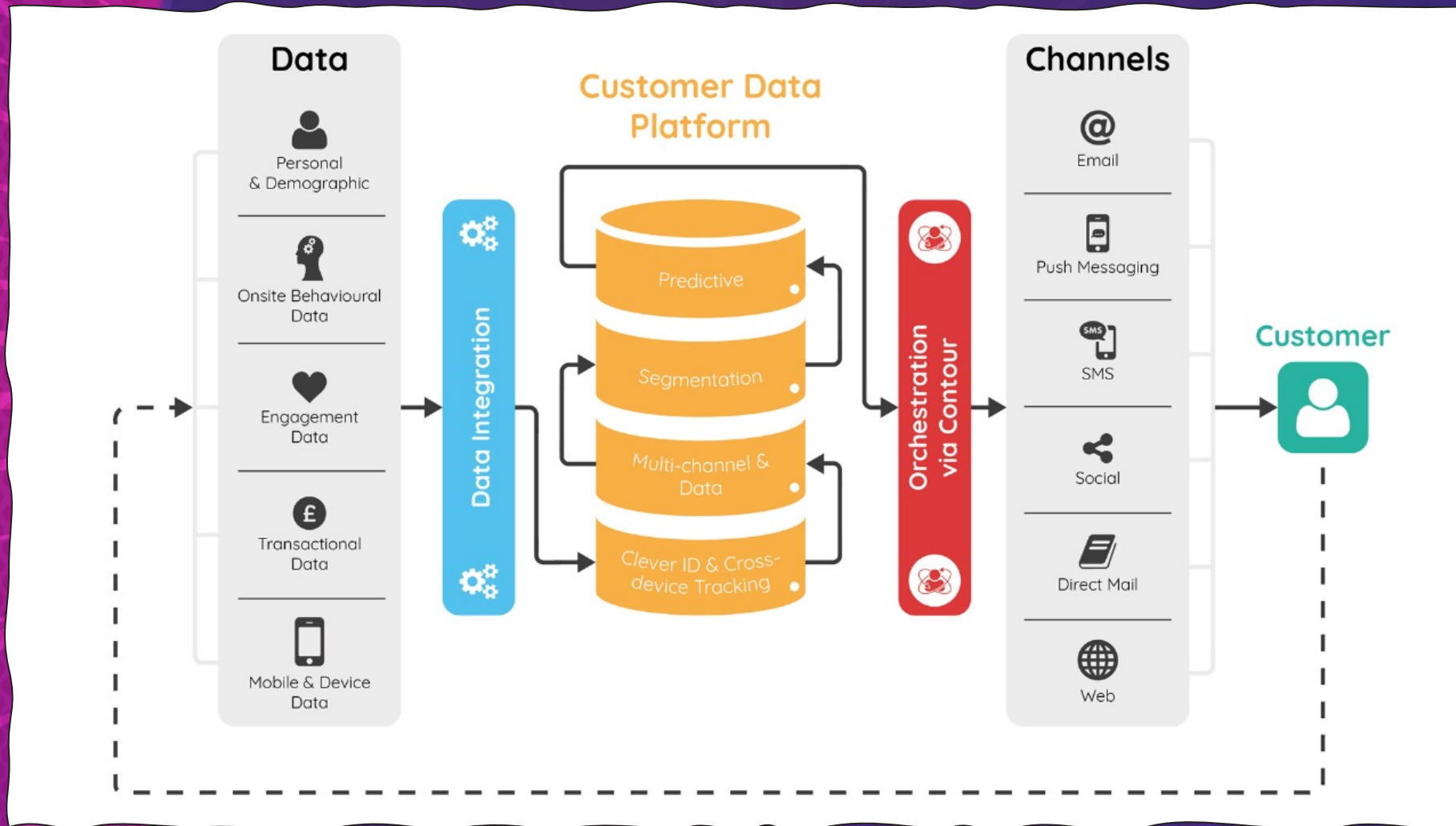
Functionality in CRM System:

- What are the weak points in the Customer Journey?
- What lacks effectiveness?
- What lacks functionality?
- What lacks ease?
- What lacks accessibility?
- What lacks enjoyment?
- What lacks emotional context?

Functionality in CRM System:

Customer Data Platform (CDP)

Thank You

JC Quintana

jcquintana@congruentX.com

jcquintana/

congruentX
PEOPLE | TECHNOLOGY | ALIGNED