

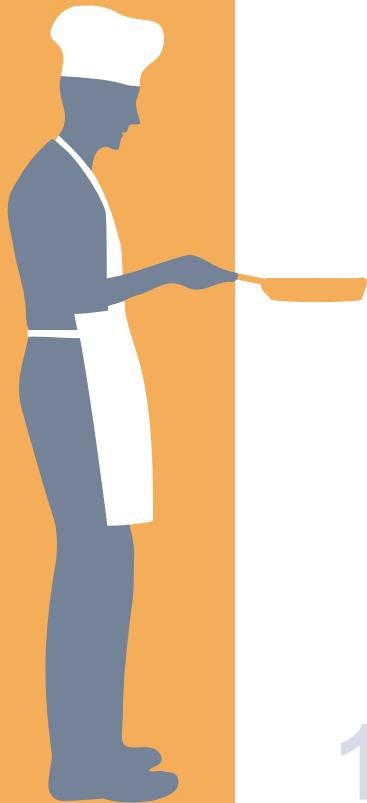
# The CIO's Cookbook

## Customer Relationship Management

# Leading Thoughts

- 1 | Digitalization now offers a 360° view of customer behaviour, current and potential buying patterns and value proposition offered by products and services
- 2 | CRM fosters growth by monetizing the customer information, knitting together Leads, Opportunities, Orders and Service records
- 3 | Successful companies moderate the obligatory nature of CRM, while leveraging capabilities to improve pipeline and forecast, accelerating growth
- 4 | Trust is ensured by data privacy, data security, process simplicity and accessibility. Tightly couple rewards and recognition to adherence

# Leading Thoughts



- 1 | Identify strategic success factors and ROI with sponsorship from the CEO, the Sales and Marketing Heads
- 2 | Identify Data Custodians for business critical elements: Customers, Products, Orders etc. Build related dataflow blueprints
- 3 | Define data cleansing, standardization, augmentation, encryption, access, sharing, archival and reporting models
- 4 | Simplify customer product offerings, configurations (guided vs Manual) and selling model (B2B, B2C, B2B2C)
- 5 | Ensure platform includes agile, AI analytics, multi-experience accessible, micro-services architecture
- 6 | Ensure seamless plug-n-play integration with HR, Finance, Marketing, CPQ and Analytics platforms
- 7 | Build a skilled and high performing organization that is on a continuous learning path. Build a best-in-class Knowledge Base
- 8 | Quickly respond to data, process and business consolidation from mergers, acquisitions and divestitures
- 9 | Continuously look for TCO opportunities to eliminate rogue applications/tools, to effectively utilize licenses and to automate processes
- 10 | Build kick-ass, real-time, multi-experience executive reporting dashboard

# CRM Landscape – Customer 360



# Strategy Plan – CRM Implementation

## Emphasize on User Adoption

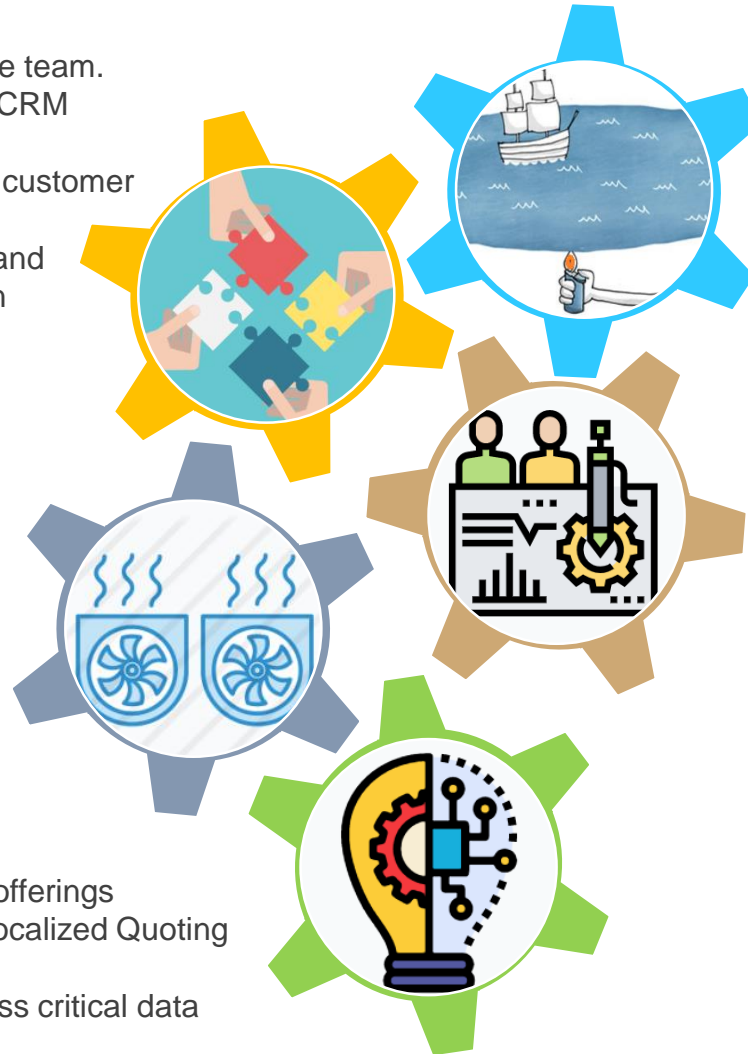
- Identify a CRM champion from executive team.
- Due diligence on ROI to generate after CRM implementation
- Demonstrate a compelling 360° view of customer lifecycle as part of the sales pitch
- Reward and recognize effective usage and reinforce where there is limited adoption

## M&A Support

- Quickly identify a unified process and integrate datasets
- Eliminate redundant business systems and processes

## Simplify Processes

- Simplify product catalogs/offerings
- Build a globally oriented, localized Quoting process
- Minimal tracking of business critical data



## Avoid Boiling the Ocean

- Adopt “Think Big, Start Small, Move Fast” strategy for CRM
- Provide a highly empathetic and super-efficient sales operations model

## Exploit AI capabilities

- Draw insights from customer sentiments
- **Identify feature demands**
- Automate pipeline creation
- Marketing to sales handover with lead scoring
- Account and opportunity insights

