

For: Application  
Development &  
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# The Modern CRM

by Kate Leggett, July 23, 2014

## KEY TAKEAWAYS

### **Modern CRM Success Require A Solid Foundation Of Operational Efficiencies**

The only source of competitive advantage is an obsession with understanding, delighting, connecting with, and serving customers. Modern CRM can only be successful if the foundations for sales, marketing, and service processes and technology are solid.

### **Modern CRM Deployments Support Deep, Multichannel Customer Engagement**

Modern CRM successes start with the right customer experience strategy, deliver business value and connect companies, customers, and things together in ways that support their end-to-end customer journey simply, easily, and ubiquitously.

### **Modernizing Your CRM Requires Focus In Six Areas**

Modern CRM success stories are nimble, flexible, and extend the traditional CRM footprint by integrating complementary applications and devices.



## The Modern CRM

Create An Outside-In CRM Strategy With Six Key Steps

by [Kate Leggett](#)

with [Stephen Powers](#) and Victoria Boutan

### WHY READ THIS REPORT

The business benefit of customer relationship management (CRM) solutions, firmly centered around improved operational efficiencies, is easy to quantify and has helped CRM become widely deployed. Yet, successful CRM is not only about features and functions or internal efficiencies. It's about better serving and supporting customers during their engagement journey. This report highlights modern CRM success stories that connect customers, companies, and devices, all which embody six overarching themes, all centered around customer obsession.

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Forrester interviewed twelve CRM companies and customers to solicit input for this report.

### Related Research Documents

[Navigate The Future Of CRM In 2014](#)

February 21, 2014

[Transform Customer Processes And Systems To Improve Experiences](#)

January 13, 2014

[Benchmark Against Best Practices To Optimize CRM Performance](#)

December 2, 2013



## **EVOLVE YESTERDAY'S CRM TO SUPPORT CUSTOMERS ON THEIR TERMS**

CRM technologies are more than two decades old. Initially, companies leveraged them to provide “inside-out” efficiencies; that is, operational efficiencies for sales, marketing, and customer service organizations when interacting with customers. They aggregated customer data, analyzed that data, and automated workflows to optimize customer engagement processes. Companies could easily argue business benefits by measuring operational metrics that were important for the company, such as reducing marketing costs, increasing revenues from salespeople, decreasing sale cycle times, better pipeline visibility, decreasing service resolution times, and more.

Because of this quantifiable return on investment (ROI), CRM became a must-have in large organizations, and continues to be today. Our data shows that nearly half (47%) of the North American and European software decision-makers (20+ employees) responding to the Forrester's Forrsights Software Survey, Q4 2013 have already implemented a CRM solution. One-quarter (24%) are spending more to upgrade their tool set. Thirteen percent plan to adopt a CRM solution within the next 12 months, with a further 10% indicating longer CRM implementation road maps.

Being successful at CRM today builds upon yesterday's internal operational efficiencies and extends the power of these solutions to better support customers through their end-to-end engagement journey to garner their satisfaction and long-term loyalty — an “outside-in” perspective. Good customer experiences correlate to customer loyalty, and loyal customers are more willing to consider another purchase from a company, are less likely to switch business to a competitor, and are more likely to recommend to a friend or colleague. Our models estimate that the revenue impact from a 10-percentage-point improvement in a company's performance, as measured by Forrester's Customer Experience Index (CXi) score, could exceed \$1 billion.<sup>1</sup>

Modern CRM strategies enable good customer experience. They support customer interactions with one another over a range of social, digital, and mobile channels. How? By leveraging the vast amounts of interaction and transaction data to deliver contextual experiences that add value to the customer and preserve the value of the company brand (see Figure 1).

**Figure 1** Modern CRM Obsesses About Serving And Supporting Customers In Their End-To-End Journeys

	<b>Yesterday's CRM</b>	<b>Modern CRM</b>
CRM goals	To create better operational efficiencies for the internal stakeholder.	To better serve and support your customers in their end-to-end journey.
Typical CRM processes	Focused on isolated tasks or processes siloed within an organization.	Focused on supporting the entire customer journey; span organizations; include devices; and include the front and back office.
CRM process agility	Inflexible processes that are hard to change.	Dynamic processes that are easy to change.
CRM capabilities	Commoditized list of features and functions.	Differentiated set of features to support customer segments and targeted journeys.
CRM users	Sales, marketing, and customer service personnel.	Everyone engaging with the company: customer-facing employees, partners, customers, and devices via the Internet of Things.
CRM success metrics	Tactical measures centered around lowering costs of acquisition and engagement.	Strategic measures centered around company revenue, profitability, and market share.

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Source: Forrester Research, Inc.

## MODERNIZE YOUR CRM IN SIX STEPS

Modern success stories embody six overarching themes, all centered around this customer obsession.

### Step 1 – Align Your CRM Strategy With Your Customer Experience Strategy

Too many CRM initiatives fail because they focus on siloed, internal strategies within the marketing, sales, or support organization. As a result, CRM efforts miss key moments that matter to customers. Forward-thinking companies start by articulating their customer experience (CX) strategy in their customers' terms, which then guides investments.<sup>2</sup>

Companies must start by defining a CX strategy that defines the intended experience, directs employee activities and decision-making, and guides funding decisions and project prioritization. The intended experience specifies the target customers, describes the desired emotional response, and offers unique value. Directing decision-making means spelling out the CX guiding principles for employees. Steering resources to the right projects means filtering funding requests using guidelines that include CX criteria. Examples of solid customer experience strategies that are aligned with customer expectations, and translate into sound CRM deployments include:

- **Uber provides frictionless engagement experiences.** Uber offers on-demand transportation services. Customers use a smartphone app to request, track the progress of their requests, rate, and pay for car service. The customer experience journey is streamlined for minimum friction. For example, upon sign up, user payment information is accepted by a quick scan of a credit card. When a rider requests car service, the driver and car details are displayed, and progress can be tracked via GPS. Transactions are effortless, as no money change hands. Customer service leverages customer history, driver, and route information for quick resolution.<sup>3</sup> Uber also proactively engages their customers for feedback to better align their service with customer expectations. For example, a negative rating from a rider immediately triggers an escalation so service agents can reach out for more information and to offer remedies. This attention to the right customer experience strategy and CRM execution has fueled Uber's growth: they receive more than 1 million car service requests each week.<sup>4</sup>
- **Hillel strengthens community ties.** Hillel aims to foster religious growth of Jewish university students as a strategy for a lifetime commitment to the faith. Their engagement strategy is focused on monitoring the strength of student-peer relationships instead of event participation. To do this, Hillel created a series of student journey modules using CRM that defined community activities and faith-based knowledge appropriate for a particular stage.<sup>5</sup> These modules allow Hillel to benchmark a student's commitment to each stage, and to plot their progress in real time. The CRM solution is architected with a mobile-first mindset, and embraces the social capabilities ubiquitously used by all students. Hillel staff report tangible results to funders and sponsors. When launched, the program tracked 6,000 students in seven campuses. At the end of 2013, it tracked more than 230,000 students across 884 campuses, a more than 3,000% increase since launch.

## Step 2 — Focus CRM Outcomes On Revenue Uplift, Not Operational Efficiencies

Rather than focusing on intricate, cost-based justifications for CRM, companies must focus on business outcomes that are firmly centered around customer obsession. Business outcomes should quantify the value of driving higher levels of revenue and company profitability through winning, serving, and retaining customers and enabling the workforce to be more productive and aligned to customer strategies. Companies that have aligned business outcomes with their customer experience strategy include:

- **Fordham University uses CRM to build relationships and boost loyalty.** Fordham University's CRM strategy is to deepen the relationship between students and the university — a relationship that lasts throughout the student's lifetime. All their tactical CRM initiatives support this strategy. For example, they use CRM to correlate class absences with visits to the health center, and leverage this information in outreach or intervention activities to better understand and support students' needs.<sup>6</sup> They track event participation and use these insights to target courses that may be of interest to students. They also continue this personalized engagement with alumni and alumni fundraising activities.

- **EMC Isilon uses CRM to boost service efficiencies and increase satisfaction.** EMC Isilon, a division of EMC, sells clustered file storage hardware and software. It remotely monitors events and alerts from its installed products in real time. Upon receiving an alert, for example from a failing disk drive, engineers diagnose the issue remotely and dispatch replacement parts if needed. By leveraging their connected product infrastructure and proactive notifications, EMC optimizes the time to resolution of issues and reduces down times.<sup>7</sup> It allows the company to provide mission-critical, enterprise customer support to customers like Harvard Medical School, Viacom, and Land Rover. In addition, the information that EMC gathers about its installed base allows them to aggregate data about each product's performance and capacity, which is leveraged in sales cycles.

### Step 3 – Leverage CRM To Effortlessly Support The End-To-End Customer's Journey

Customers are increasingly impatient as they engage with companies. 55% of US online adults will abandon online purchases if they can't find a quick answer; 77% say that valuing their time is the most important thing a company can do to provide them with good online customer experience.<sup>8</sup> Customers want to use multiple communication channels and touchpoints in the course of a single interaction, and not have to repeat their situation every time they switch channels. For example, they want to start a return process online, and drop the merchandise off in a store; or they want to purchase merchandise online, and pick it up in a store. Forward-thinking companies must eliminate points of friction.

- **Cells4Life supports customer journeys that last a quarter century.** Cells4Life is a UK stem cell bank that stores tissue samples for a quarter century or more. They use a CRM to manage their customer records, including associated test results, and customer contracts, and the wealth of environmental data that is tracked for each customer sample.<sup>9</sup> They are supporting a multi-year end-to-end customer journey, yet at the same time ensure compliance with the policies that regulate the handling of tissue samples. To this goal, they streamline the customer acquisition process, converting 20% of those who request a Welcome Pack into customers, and 80% of those who use the "Contact Us" form. The yearly renewal process is similarly simple. It leverages electronic signature capture technology to expedite contract signing; and uses electronic invoicing, billing, and online payment forms remove the friction points in the renewal process.
- **Fort Wayne provides streamlined citizen engagement to its breadth of services.** The City of Fort Wayne's 311 services provides the region's 250,000 citizens consolidated access to 19 city departments.<sup>10</sup> Their call center, fielding more than 1,000 calls per day during peak times, supports its citizens' engagement journeys with the city by answering questions about city programs, policies, and activities, and processing requests for departments as diverse as property management, sewer maintenance, street lighting, and fire administration. Their CRM integrates with the various back-end systems used by the departments it supports, simplifying engagement, and allowing the city to measure the efficacy of service delivery across all

departments. This measurement is publicly available in a scorecard, and is used to hold the city accountable for ongoing investments. Since the launch of the 311 services, the average call waiting time has been reduced from 39 minutes to 24 seconds, and the center boasts a 4 second average speed of answer.

#### Step 4 – Use CRM To Deeply Personalize Engagement

Customer experiences must be deeply personalized, based on explicit and implicit feedback about customer needs and preferences, and must be delivered in the moment, taking into account a person's current state and location.<sup>11</sup> Companies that deliver relevant customer experiences at scale include:

- **Weight Watchers leverages CRM data to help members transform their health.** Weight Watchers, a global weight loss and management company, uses CRM to consolidate customer interactions across all touchpoints, online and offline, as well as across digital and social channels.<sup>12</sup> Members use a mobile app to design menus, follow meal plans, log their daily progress, check into meetings, and connect with other members — effectively melding their offline and online activities, which are all captured in CRM. Agents rely on real-time member data to deeply personalize online and offline conversations and workflows — advice that can transform a member's personal wellness. Since the launch of their CRM, Weight Watchers has reduced average handling time (AHT) by between 15% and 20%. They have achieved a 4% increase in their already-high customer satisfaction scores and achieved an overall ROI of 331% (see Figure 2).
- **ModCloth uses customer insights to shape its creative direction.** ModCloth is an American online retailer specializing in vintage clothing, accessories, and décor. It leverages the voice of its members to drive its creative direction. It presents its new fashion to shoppers, and incorporates their input in the final product. It allows shoppers to view designer samples and vote on which ones become part of the collection. To date, more than 700 items have been picked from 3,000 samples, and the customer-chosen fashions sell twice as well as others on the site. Using customer data from its CRM, ModCloth personalizes the shopping experience by using stylists to guide its members to the right products and answer their questions.<sup>13</sup> They attribute a same-day conversion lift of 20% from shoppers who interacted with a stylist. ModCloth's advertising team also creates banner ads that answer common questions, educating customers, and deflecting support requests.



**Figure 2** Weight Watchers Uses Real-Time Data To Customize Programs

**2-1** Members check into meetings using a mobile application



**2-2** Agent uses real-time data to customize programs



Source: Weight Watchers website

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Source: Forrester Research, Inc.



### **Step 5 – Extend CRM Beyond Its Traditional Footprint By Leveraging Integrations**

Legacy CRM applications tackled huge swaths of business problems and offered extensive integrations and customizations within an application. Customers reported that these applications were heavyweight: difficult to implement, maintain, and roll out innovations to their end users, ultimately hampering their business agility.<sup>14</sup> Now, with web services and standardized APIs, it's far easier to use lighter-weight solutions, or best-in-breed applications, allowing organizations to purchase just what they need and integrate it into a larger technology ecosystem, rather than trying to purchase a massive application that covers every eventuality. This allows companies to rapidly innovate to solve unique business challenges:

New England Biolabs (NEB), a supplier of specialized enzymes and reagents for DNA research wanted better visibility into product usage, and to help their customers optimize stocking and consolidate product shipments. Using readily-available components that can be purchased from Amazon, NEB built a custom tablet application as an interface to their CRM application that resides on the front of the laboratory freezers that store products that scientists use.<sup>15</sup> Scientists use this tablet app to open the freezer and scan products for check out. The CRM tracks all interaction data, as well as information on the freezer's temperature and lock status. NEB connects the freezers with its back office systems, which automate inventory replenishment. They also use this information as inputs to optimize product formulas or bundle products together for sale. They are currently working on capabilities to let scientists text message the freezer for product availability status (see Figure 3).

### **Step 6 – Combat The CRM “Hate Factor” By Engaging CRM Users Simply And Easily**

Face it, most people hate using CRM, as data entry and retrieval is hard to do. In a recent survey, Forrester found that 23% of respondents struggled with gaining user acceptance of new technologies.<sup>16</sup> CRM success demands role-based, simplified user interfaces. User experiences should be task-based and map to common processes, which proactively display relevant information such as the products that the customer owns, the services they subscribe to, and what customer tier they're in. Also, engagement experiences that are effective on a laptop do not work on mobile form factors. For example, mobile sales force automation (SFA) has become the de-facto standard, and requires uncluttered, task-based, responsive user interfaces (UIs) which can be easily personalized and extended to embed external content such as maps, calculators, and enterprise resource planning (ERP) views directly in the UI.

IBM's 45,000 strong global sales force sells high value, complex solutions, which take many detailed conversations between the buyer, solution architects, and product experts in order to close the sale. To this effect, IBM deeply integrates their CRM into their social networking platform.<sup>17</sup> Salespeople use instant messaging, presence indicators, social activity streams, and tagging directly from their SFA to collaborate across teams and with their prospects, allowing them to move the deal forward. IBM also uses predictive analytics embedded in their CRM to find and focus their resources on the

most promising opportunities that are predicted to close. A focus on usability made adoption easy. IBM reported that 2 million opportunities were present in the global system soon after the rollout, and today 2,500 files are shared per week between sales and IBM product experts.

**Figure 3** New England Biolabs Connected Freezer Delivers Real-Time Customer Insights



Source: New England Biolabs website

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Source: Forrester Research, Inc.

## BEFORE MODERNIZATION, SHORE UP YOUR FOUNDATION

Modern CRM deployments only succeed if the foundations are solid. CRM deployments must be scalable, highly performant, and must support security protocols, data privacy requirements, and third-party credentials like the Payment Card Industry (PCI) and the Health Insurance Portability and Accountability Act (HIPAA) that matter in your industry. All actions must be logged and be auditable. Master data management and data governance policies must be put in place. In addition, leverage the right enabling technologies, like the cloud, as it provides the ability to innovate faster, and be more agile in supporting their customer's changing engagement preferences.<sup>18</sup> Don't underestimate the difficulty of getting these foundational elements right. In a recent survey of more than 650 and business and technology management decision-makers indicated that their top two challenges are creating a single view of customer data and information (69%) and managing data quality (60%).<sup>19</sup> If any of these basic considerations are not met, CRM deployments quickly fail.

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### RECOMMENDATIONS

#### PROVE CRM'S VALUE WITH MEASURED STEPS RATHER THAN A BIG BANG

Modernizing CRM is a daunting task. It requires a company to deeply obsess about how the customer wants to engage with the company, and translate these insights into a transformation in customer experience strategy, organization, technology, and engagement processes. This is a huge undertaking, and it's important to start with something manageable. CRM leaders should concentrate on building initial proof points to validate their vision and engage the rest of the organization. In particular, they must:

- **Create a cohesive, “good-enough” end-state vision.** A vision for the future is a critical component — possibly the critical component for modernization activities. Without it, decisions are bound to be made in isolation, which may undermine the success of ongoing initiatives. With it, organizations are able to speed up their decision-making by immediately ruling out options that cause them to diverge from their goals. However, it is important not to overly focus on crafting the perfect vision. Aim for “good enough” and recognize that this vision will need to change over time — it does not have to be perfect to get things moving.
- **Walk in your customer's shoes.** Few technology managers understand how their customers want to interact with companies. Prior to launching any modernization activity, observe how your customers interact with you. For example, do customers check a price online while in your store? Or does a business customer read reviews of your product while in a sales meeting? Understand what capabilities and devices will make your customer-facing personnel more successful at their job in serving their customers.
- **Start with improving a few cross-touchpoint customer journeys.** It is impossible to map every single customer journey. Instead of falling victim to endless analysis, identify a set of

key cross-touchpoint journeys that matter to your customers. For example, simplify cross-functional processes that integrate web and store operations; or use select insights from connected devices to better personalize customer conversations. Use these journeys as proof points and ensure that you can measure the results.

- **Constantly review progress and don't be afraid to kill off irrelevant projects.** Companies often plot out three-to-five-year visions that they refresh every year. To keep these plans relevant, conduct a progress review of each initiative on a monthly basis. By feeding up-to-date customer insight from surveys and focus groups into these reviews, you can easily identify those projects that are no longer delivering real value for either the organization or its customers. Understand that the pace of change in consumer behavior is quick. This means that something that was planned 12 months ago may now be a waste of time — and don't be afraid to kill off projects that have become irrelevant.
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## SUPPLEMENTAL MATERIAL

### Methodology

Forrester's Forrsights Software Survey, Q4 2013, was fielded to 2,074 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from small to medium-size business (SMB) and enterprise companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during October 2013 and November 2013. ResearchNow fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester's Forrsights for Business Technology fields business-to-business technology studies in more than 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester's Forrsights for Business Technology ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

Forrester conducted an online survey fielded in October 2013 of 7,538 US individuals ages 18 to 88. For results based on a randomly chosen sample of this size ( $N = 7,538$ ), there is 95% confidence that the results have a statistical precision of plus or minus 1.13% of what they would be if the entire population of US online individuals ages 18 and older had been surveyed. Forrester

weighted the data by age, gender, income, broadband adoption, and region to demographically represent the adult US online population. The survey sample size, when weighted, was 7,522. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Please note that this was an online survey. Respondents who participate in online surveys have in general more experience with the Internet and feel more comfortable transacting online.

### Companies Interviewed For This Report

Cells4Life	Oracle
Contact Solutions	salesforce.com
Fordham University	SAP
Kana Software, A Verint Company	SugarCRM
Microsoft	The Boston Globe
New England Biolabs	Zendesk

### ENDNOTES

- <sup>1</sup> Years of Forrester data confirm the strong relationship between the quality of a firm's customer experience (as measured by Forrester's Customer Experience Index [CXi]) and loyalty measures like willingness to consider the company for another purchase, likelihood to switch business, and likelihood to recommend. We used that data to build simple models that show how changes in loyalty associated with higher CXi scores can affect a company's yearly revenue. See the March 26, 2012, "[The Business Impact Of Customer Experience, 2012](#)" report.
- <sup>2</sup> Companies see substantial business benefit when they systematically hunt down and eliminate customer experience problems. But eventually they need to stop doing business in ways that create those problems in the first place. See the March 27, 2014, "[Transform To An Experience-Driven Organization](#)" report.
- <sup>3</sup> Uber's customer service uses Zendesk, which is integrated into its application.
- <sup>4</sup> Source: Matthew Panzarino, "Leaked Uber Numbers, Which We've Confirmed, Point To Over \$1B Gross, \$213M Revenue," TechCrunch, December 4, 2013 (<http://techcrunch.com/2013/12/04/leaked-uber-numbers-which-weve-confirmed-point-to-over-1b-gross-revenue-213m-revenue/>).
- <sup>5</sup> Journey modules were built using SugarCRM.
- <sup>6</sup> Fordham University tracks all student activities in SugarCRM.
- <sup>7</sup> The connected product infrastructure is built on top of the Salesforce1 platform.
- <sup>8</sup> Source: Forrester's North American Technographics® Customer Experience Survey, 2013.

- <sup>9</sup> Cells4Life uses SugarCRM.
- <sup>10</sup> The City of Fort Wayne's 311 services are provided by KANA Lagan.
- <sup>11</sup> Companies must deliver the right experience to the right user at the right time and on the right device — a tricky proposition in this age of device proliferation. User profiles combined with historical data and real-time feedback can help firms deliver increasingly relevant, tailored experiences that meet specific user needs. See the November 19, 2012, "[Contextualization](#)" report.
- <sup>12</sup> WeightWatchers uses a CRM from Microsoft Dynamics.
- <sup>13</sup> Source: Cristina Rouvalis, "ModCloth's Customers Are Always Right," Hemispheres, May 2014 (<http://www.ink-live.com/emagazines/hemispheres-united-airlines/1637/may-2014/#60>).
- <sup>14</sup> A recent Forrester survey of more than 650 business and IT decision-makers indicated that their top two challenges are creating a single view of customer data and information (69%) and managing data quality (60%). Other challenges include creating customer insight to drive decision-making (44%), changing existing business processes (43%), improving coordination across different technology platforms (43%), and gaining cooperation across the organization for customer management improvement efforts (39%). See the December 2, 2013, "[Benchmark Against Best Practices To Optimize CRM Performance](#)" report.
- <sup>15</sup> NEB leverages the Salesforce1 platform for its CRM tablet app.
- <sup>16</sup> See the December 2, 2013, "[Benchmark Against Best Practices To Optimize CRM Performance](#)" report.
- <sup>17</sup> IBM uses SugarCRM and IBM's Connections social networking platform.
- <sup>18</sup> CRM technologies are moving to the cloud. According to Forrester's Forrsights Software Survey, Q4 2013, 31% of North American and European software decision-makers (20+ employees) who are planning to implement or have implemented a CRM solution have replaced (15%) or plan to replace (17%) their on-premises CRM solutions with a SaaS alternative. In addition 24% currently use some SaaS CRM to complement their existing solutions, and 14% plan on using more SaaS CRM solutions to complement traditional on-premises deployments in the next two years.
- <sup>19</sup> Enterprises face many basic challenges in meeting their CRM goals. Other challenges include creating customer insight to drive decision-making (44%), changing existing business processes (43%), improving coordination across different technology platforms (43%), and gaining cooperation across the organization for customer management improvement efforts (39%). Forrester clients facing these challenges want to know what CRM technology project risks and pitfalls they need to be mindful of, and how they stack up against the best practices of other organizations. See the December 2, 2013, "[Benchmark Against Best Practices To Optimize CRM Performance](#)" report.



## About Forrester

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