

Tool #22: Guide to Understanding Your CRM Needs

Understanding your CRM Needs

Many organizations buy a CRM solution without first considering what business issues they really want to address. However, the premature and poorly planned implementations severely undercut likelihood of success. Industry analysts like Gartner, Forrester and Butler suggest that 50% to 70% of CRM projects do not deliver a return on investment or fail altogether for such reasons.

By highlighting the key issues you want to solve within your business, you will be better informed to choose a CRM solution that is capable of meeting these needs effectively. Additionally, a system that has been implemented based on its ability to solve business issues is one that will drive success throughout the organization, will be adopted well by your staff, and is therefore most likely to generate a return on your investment.

Use the table below, informed in part by the Extended Campus at Oregon State University's CRM needs assessment, to prioritize your teams CRM-related needs.

Implementation Note: This tool should be used before the process of selecting a vendor begins. It is best applied when brainstorming customer relationship management trouble spots and goals. The magnitude of those needs (i.e., the gap between current and envisioned processes) should inform the decision to pursue a CRM system as well as the determination of who will be using the CRM (a question that not only influences cost, via the number of licenses needed, but the desired capabilities and outcomes as well). The tool can also support change management by fostering consensus among various constituents.

Desired Capability or Outcome	Priority Level
Sales Force Automation	
We need a central repository to hold all our prospective student data and interactions across the organization so everyone is on the same page.	H M L
We need a better way to assign, track and prioritize leads so our recruiting team does not miss any 'hot' leads.	H M L
We need better visibility into our pipeline and forecasts so we can plan better.	H M L
We need our recruiting team to spend less time on administrative tasks, like creating management reports.	H M L
We need to be able to identify the status and history of leads and opportunities at the click of a mouse.	H M L
We need a more effective way to share knowledge and information so we can learn and improve our processes.	H M L
We want to be able to create, easily access, and use a selection of email templates to save us time when replying to common questions or follow-up activities.	H M L
We want to know which of our recruiting staff people is under/over performing so we can provide extra coaching or learn from best practice.	H M L

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We need to track customer contracts and manage renewals so we don't miss any contract education renewal opportunities.

H M L

Marketing Automation

We want better visibility into the sources that generate the highest quality leads, so we can alter our budget spend accordingly.

H M L

We want a way of calculating accurate marketing campaign ROI and the success (or lack thereof) of marketing campaigns.

H M L

We want to be able to capture leads directly from our website and follow up on these in a more effective way.

H M L

We want to streamline our communications with prospects by using automatic communications plans.

H M L

We need a better way to segment and filter our data, so we can generate more targeted marketing campaigns.

H M L

We need to de-duplicate data collected from different sources in order to make data analysis and marketing campaign development easier.

H M L

We need greater visibility into the outcome of leads after we pass them on to our colleagues in other departments.

H M L

We advertise using Google Adwords and want to know which key words and pay-per-click campaigns are the most successful at generating conversions.

H M L

We have a lot of data collected through various channels and want to easily import and store all this data in one central system.

H M L

Communications with Prospects

We need a better way of assigning, tracking and prioritizing cases for more effective follow-up.

H M L

We want to establish a greater understanding of what issues our customers are having most frequently so we can get to the root of the problem, whether this be more training, improved processes etc.

H M L

We need our recruiting team to have visibility of any issues their customers are having so they can respond more appropriately.

H M L

We need a more effective way of reporting on the problems our customers have in order to help us improve our business processes.

H M L

We want the ability to monitor how our support teams are performing so we can improve our handling of cases and learn from best practices.

H M L

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We have a 'Help' section on our website and want our customers to be able to raise cases directly from our website so it's easier for them to report issues. H M L

Our business is a services organization; we want to be able to track how efficiently we engage with our prospects. H M L

We want to be able to see a particular customer's order history and to track and report on the progress of orders, helping to give us better insight into our customers purchasing behavior. H M L

We have various 'groups' of staff, and for security reasons only want specific groups and people to be able to access certain student and/or prospect data. H M L

Events

We want to be able to better advertise, register participants, and organize online and in-person events. H M L

Vendors

We do not have the skills in house to install and effectively manage a CRM system. We want to ensure our data is secure but at the same time provides guaranteed Service Levels for the availability of the application. H M L

We want a vendor that has experience within the Higher Education industry, and will happily show me other customers of a similar size and with similar requirements to mine, who are successfully using the application. H M L

We want a solution where all the upgrades and telephone support we need is included within the cost. H M L

We may require occasional consulting or 'refresher' training. If we need extra help, we want a way of accessing this on a 'pay as you go' basis. H M L

We want an annual subscription to a solution where there is an incentive to ensure that we're successful on an on-going basis. H M L

Platform Features

We want to be able to access our CRM wherever we are via a universal, web-based interface that works in any modern browser as opposed to one that is unique to the computer(s) on which it is installed. H M L

Our department does not control enterprise computing installations on campus, so we want the CRM vendor to be responsible for the software releases/versioning and patches as needed via a Software-as-a-Service (SaaS) delivery option. H M L

We need a solution that has proven to integrate well with our SIS H M L

We want a solution that integrates with chat or social media services like Facebook H M L

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Notes