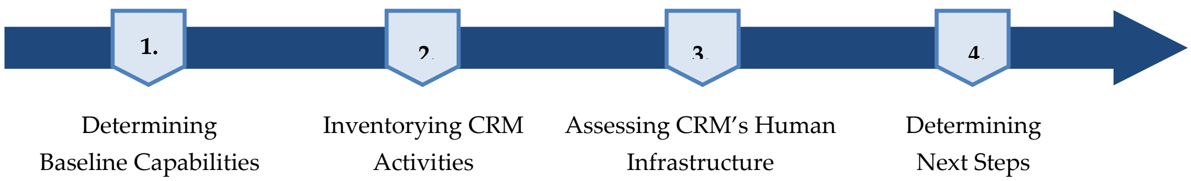
Tool #38: CRM Check-Up Guide

The arduous path to implementation often leaves CRM leaders with a false sense of completion once the system has been launched and utilization seems solid. However, lack of maintenance and continuous evaluation can cause CRM implementations to falter over time or fall far short of their full potential. In order for CRM to thrive, leaders should periodically and systematically check in on the system—both the human and technical elements—to ensure that it is meeting goals (or, if not, whether goals should be re-considered) and that it is performing well against pre-implementation benchmarks. With this information, leaders can develop ongoing improvement plans.

The CRM Check-Up Guide, which is optimally used six to eight months post-go-live, will help implementation leaders assess the overall health of the system in light of pre-established goals and expectations. In so doing, it will help craft future plans for improving the system.

Overview of a CRM Check Up



1. Determining Baseline Capabilities

Optimally, the health of your CRM implementation can be gauged relative to performance before the system was in place. Such comparisons paint the clearest picture and also tend to make the most compelling case for continued or additional resources and wider utilization. Prepare for the CRM check-up process by noting in the table below the metrics, KPIs, and benchmarks that you were/are monitoring before/during implementation and that you hope to see improve after implementation. For help determining KPIs to track, see Tool #39: CRM KPI Builder. Sample KPIs appear below, although ideally, unit leaders will select a benchmark for business drivers (i.e., "bottom line") outcomes and for each of the major functional areas affected by CRM.

Functional Area	Metric	Benchmark (before CRM)
Communication with Prospects	Response Time	2-3 days
	Customization of Communication	one program-specific email
	Communication Modalities	email, phone if prospect calls
Event Management	Attendance at Events	10.5 attendees on average
	Number of Events	7 events/year
	Funnel Penetration of Attendees	20.5% apply; 10.2% enroll
Overall (Bottom-Line)	Number of Applications	7,450
	Conversion Rate	14.6%
	Cost per Applicant	$540
	Cost per Enrollment	$900
	Staff time per Enrollment	3.5 hours

The examples above are representative: metrics listed in each category are not meant to be exhaustive, nor are the numbers taken from a specific institution. A similar set of lists should be made of your pre-implementation benchmarks.

2. Inventorying CRM Activities

The next step in assessing the progress of your CRM implementation involves taking stock of what exactly it is being used to do. For many, this list will reveal areas where the system is thriving and others where utilization has fallen off or new business processes have proven suboptimal.

<table>
<tr><th>Typical CRM Activities</th><th>Attributes to Note</th></tr>
<tr><td>Interaction Tracking</td><td rowspan="15">Description: What was the old state, current state, and goal state?
Value Proposition: What is the overall good rendered by changes to the old state?
Cost/Benefit for Customers: What are the specific costs and benefits for prospects?
Cost/Benefit for Institution: What are the specific costs and benefits for the institution and staff?
Relevant KPIs/Benchmarks: What metrics from Step #1 are specific to this activity?
Notes on Adoption: How easily were CRM-driven changes to the activity adopted? What lessons were learned?
Overall Proficiency Grade: What gut score would you apply to how well the activity delivered on its value proposition?
Pre-CRM Implementation
Post-CRM Implementation</td></tr>
<tr><td>Automated Communications</td></tr>
<tr><td>Event Tracking/Management</td></tr>
<tr><td>Knowledge Management System</td></tr>
<tr><td>Marketing Campaigns</td></tr>
<tr><td>Chat</td></tr>
<tr><td>Self-Service Portal</td></tr>
<tr><td>Call Center Management</td></tr>
<tr><td>Reporting</td></tr>
<tr><td>Custom:</td></tr>
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Example Inventorying Notes

The following is an example of the type of notes that CRM leaders should develop for each CRM activity/functional area.

Notes on CRM Activity: Automated Communications

Description: prospective students are placed on automatic communication tracks triggered by a prospect's demonstration of interest in the institution or a specific program (e.g., by submitting an inquiry form, calling, visiting, etc.). Communications are sent at pre-determined intervals once the first has been triggered. Communications in the series provide varied topical content; some are customized according to the prospect's program of interest.

Value proposition: Improve response rate and quality of communications with prospects while lowering the human resources needed to provide them. This allows recruiting staff to spend a greater share of their time engaged in one-on-one conversations with prospects that are likely to value them.

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Cost and benefit for customers: No cost for customers. Benefit seen in improved response time, variety of content (e.g., program-specific, financial aid, career outcomes, etc.), and quality of content.

Cost and benefit for institution: Cost stems from staff time needed to develop and operationalize communications plan. Benefit is seen in staff time saved that would have otherwise been used communicating with prospects. Bottom line benefit: improved conversion rates, lower staff resources.

Relevant KPIs/Benchmarks:

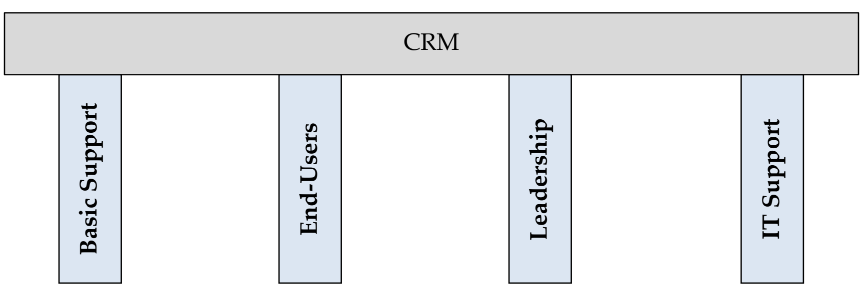
	Before CRM	Post-CRM
Response Time	2-3 days	24 hours
Customization	1 program-specific email	5 program-specific emails interspersed across communication plan
Staff time required	~2 hours spent on email across the lifespan of a cycle	0 hrs (entirely automatic and triggered by inquiry form)

Notes on adoption: Program-specific collateral still has not been developed for project management certificate program; have had difficulty gathering career outcomes insights (to incorporate into emails) from various program directors; need to re-assess the need for hard-copy mailings in the communication plan.

Overall grade: Before CRM (when this was done by hand): C After CRM (automated): B+

3. Assessing CRM's Human Infrastructure

Another key component to a sound and sustainable CRM implementation is the support it receives from staff. A thorough check-up assesses the strength of these sources of support. For most, this dimension of the check-up will be predominantly qualitative. That should not prevent you from reviewing the behaviors expected of each group of constituents and monitoring for warning signs (summarized in the diagram below).



	Basic Support	End-Users	Leadership	IT Support
Expectations	▪ Pulls reports ▪ Answers basic Qs ▪ Monitors for improvements	▪ Utilize the system ▪ Contribute feedback and propose improvements	▪ Monitors progress towards bottom-line goals ▪ Cheerleads for the cause	▪ Implement system changes at the request of team ▪ Serve as technical support to end users when appropriate
Warning Signs	▪ Bottlenecks or complaints related to any of the above	▪ Shadow systems ▪ Dissatisfied factions	▪ Lack of willingness to do any of the above	▪ Bottlenecks or complaints related to any of the above

4. Determining Next Steps

Are Your Original Goals Your Current Goals?

Before completing your final analysis, CRM champions should consider whether their original CRM strategies and goals still apply. It is not uncommon for them to change in light of the on-the-ground reality of implementation.

After your current CRM strategy has been confirmed, you can move on to determining next steps. For both the CRM activities you inventoried as well as the Human Infrastructure you assessed, you should determine which fall into the categories below and develop plans accordingly.

	Definitions	Suggested Actions
Thriving	Robust, resource-efficient, an exemplar	Assess for best practices and lessons that can be applied elsewhere. Consider the drivers of success.
Stable	At steady-state; will reliably continue without additional attention	Hold the course.
Weak	Faltering; demands additional attention and resources	Consider the drivers of failure; re-assess relevance of activity to strategy; look for opportunities to apply best practices and lessons learned from above

5. Assembling a Summary Table

Funnel final thoughts about the health of each CRM component in the table below.

	Component	Health	Action Steps
Functional Components	Interaction Tracking	Weak--Stable--Thriving	
	Automated Communications	W----------S----------T	
	Event Tracking/Management	W----------S----------T	
	Knowledge Management System	W----------S----------T	
	Marketing Campaigns	W----------S----------T	
	Chat	W----------S----------T	
	Self-Service Portal	W----------S----------T	
	Call Center Management	W----------S----------T	
	Reporting	W----------S----------T	
	Custom:	W----------S----------T	
	Custom:	W----------S----------T	
	Custom:	W----------S----------T	
Human Components	Basic Support	W----------S----------T	
	End Users	W----------S----------T	
	Leadership	W----------S----------T	
	IT Support	W----------S----------T	
	Custom:	W----------S----------T	
	Custom:	W----------S----------T	