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中小企業資訊科技培訓計劃

CRM Workshop for SMEs (T03)

中小企客戶關係管理工作坊

Instructor : Paul Yu

Organizer

MEIIA
製 造 業 創 匯 商 會
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Co-organizer

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WHY CRM? - High Cost in Getting New Customers

- Statistics showed costs 5 times more to get new customers' business compared to the cost getting business from existing customers
  - High Competition (High Cost in Commission)
  - No Trusts (High Cost in Brand Building)
  - Don't know your prospects (High Cost in Marketing)

  Solutions
  - Focus on existing customers
  - Sales Automation

WHY CRM? - Not Easy To Retain Old Customers Satisfactions

- Price War

- New Services Come Out

- No Unique Products (Copy Cat)

Solutions

- Create Customer Loyalty by Unique Relationship and Services
  - Know your customers
  - Understand Markets / Competitors
  - Being Pioneer

WHY CRM? – Hard to Know Your Customers

- Lack of Customers Information
  - High employee turn over in company
  - Customer behavior keep changing
  - Complex communicating channels
- Overflow and increase complexity of customers data

Solutions
  - Company Need Centralized Customer Database
  - Data mining computerized solution for customers

Defining CRM by Wikipedia

" **CRM** is a broadly recognized, widely-implemented strategy for managing and nurturing a company's interactions with customers and sales prospects. It involves using technology to organize, automate, and synchronize business processes—principally sales related activities, but also those for marketing, customer service, and technical support. The overall goals are to find, attract, and win new customers, nurture and retain those the company already has, entice former customers back into the fold, and reduce the costs of marketing and customer service. "

http://en.wikipedia.org/wiki/Customer_relationship_management

Defining CRM by CIO

- "**CRM** stands for Customer Relationship Management. It is a strategy used to learn more about customers' needs and behaviors in order to develop stronger relationships with them. Good customer relationships are at the heart of business success. There are many technological components to CRM, but thinking about CRM in primarily technological terms is a mistake. The more useful way to think about CRM is as a strategic process that will help you better understand your customers' needs and how you can meet those needs and enhance your bottom line at the same time. This strategy depends on bringing together lots of pieces of information about customers and market trends so you can sell and market your products and services more effectively."

http://www.cio.com/article/40295/CRM_Definition_and_Solutions

Defining CRM (Myself)

- Customer Focus Management Strategic
- Technology only in assistance of
  - knowing your customers
  - improving communication,
  - and doing analysis

Defining CRM

- According to Forrester Research, spending on customer relationship management is expected to top $11 billion annually by 2010, as enterprises seek to grow top-line revenues, improve the customer experience, and boost the productivity of customer-facing staff.

Forrester Research (2008) Best Practices Adoption

Defining CRM – Possible Modules

CRM Support Frontline Services

- Sales Automation
- Customer Services
- Call Center
- Marketing
- Management Analysis
- Collaboration

Defining CRM – Possible Modules

- **Sales Automation**
  - Alert Follow-up Sales Activities (e.g. Renew Contract / Return Call / Appointment)
  - Sales Pipeline Help Find Priority
  - Sales Forecasting Give Sales Clear Picture

Defining CRM – Possible Modules

- **Consumer Services**
  - Call Center
  - Store / Customize Contact Information
  - Contact History (e.g. Ordered History / Documents Sent)
  - Alert Consumer Activities Based on Each Customer Needed (e.g. Send Birthday Card)
  - Tracking On Not Resolved Issue
  - Sharing Knowledge Based

Defining CRM – Possible Modules

- Marketing Management
  - Help Find Target in Customer Database
  - Create Marketing Campaigns
  - Helps Collect Customer Feedback
  - Tracker for Web Marketing
  - Marketing Report to Measure Effectiveness

Defining CRM – Possible Modules

- **Management Analysis**
  - Help Make Business Decisions
  - Reports on Sales Activities
  - Reports on Customer Services Cases
  - Reports On Incomplete Tasks
  - Create Various Reports
  - Assign Tasks for Users
  - Assign Workflow For Process

Defining CRM – Possible Modules

- Collaboration – Help Frontlines Staffs to Communicate Effectively
  - Shared Calendar and Tasks
  - Knowledge Based
  - Request / Assign Tasks To Users
  - Workflow Confirm Users Procedure Go Through And Know Where is the Bottleneck.

The Role of CRM In Enterprise

CRM

Accounting

Human Resources

Manufactory

Distribution System
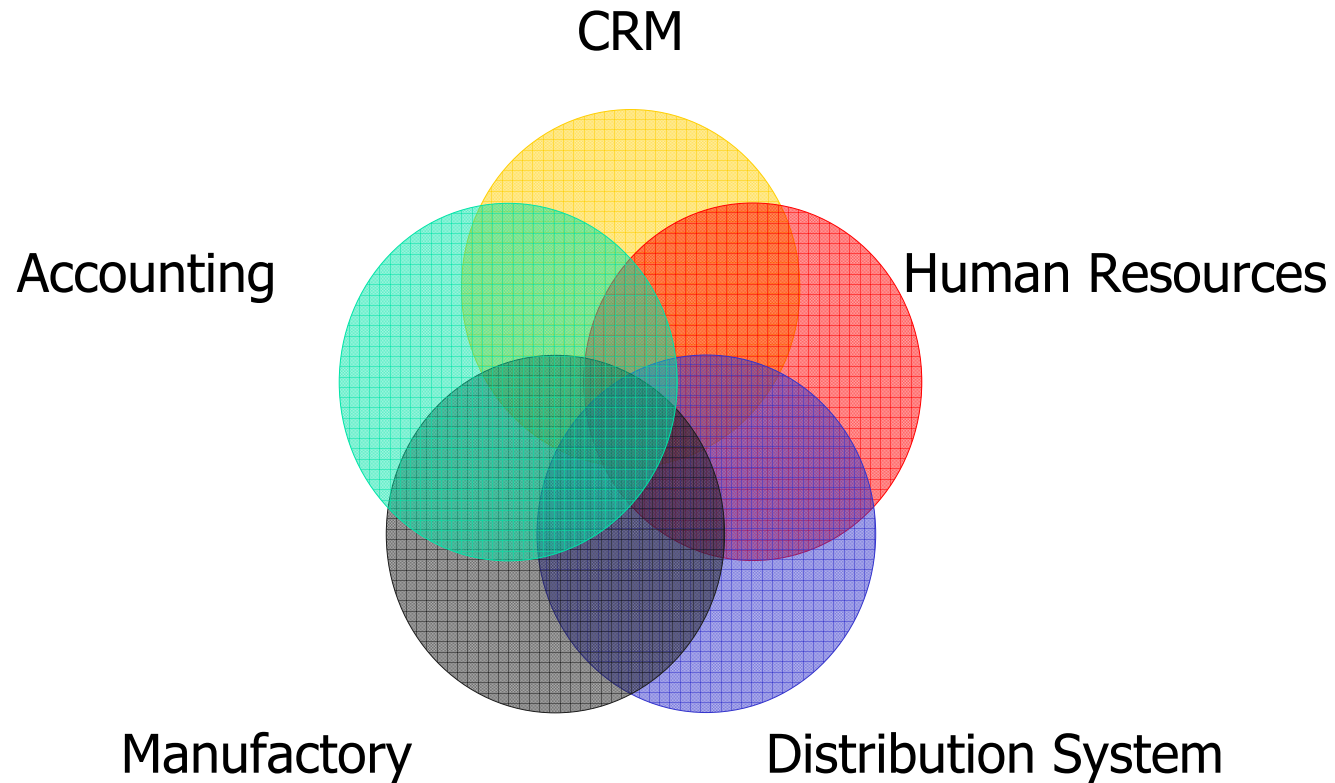
Example : Hong Kong Broadband
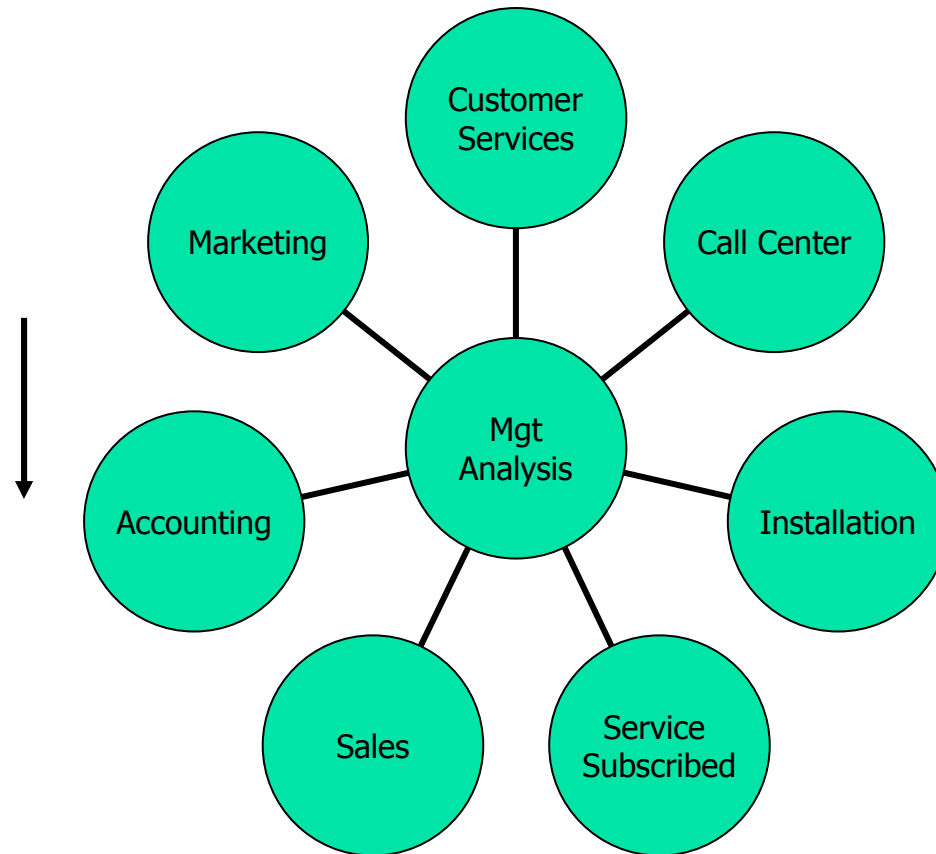
CRM Major Functions For SME
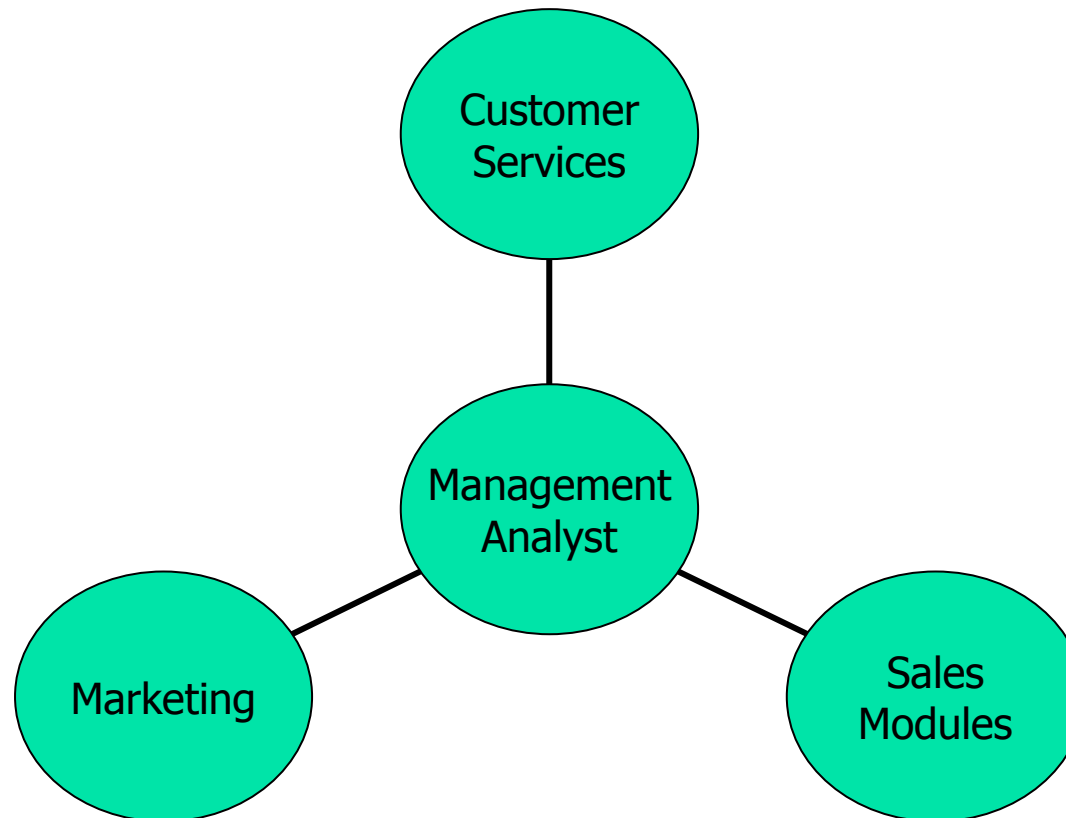
Benefits of CRM in SMEs

Summing it up CRM Gains for SME's include:

- Better Customer Knowledge
- Customer Analysis
- Provide Better and Unique Services
- Improved <u>customer service</u>, loyalty, and retention
- Added <u>cross-selling</u> and <u>up-selling</u> opportunities
- Streamlined sales and marketing processes

Benefits of CRM in SMEs (Cont)

Summing it up CRM Gains for SME's include:

- Better Market Targeting and Segmentation
- Permission Marketing
- Reducing Redundant Communication
- Increase Internal Accountability
- Reduce Harmful Effects From Staffs Changing
- Cost Saving By Lesser Employee Required
- Decrease in Marketing Cost

Effects of CRM in SME in Future

- CRM will be a critical business elements in SME
- Sooner or Later, CRM will be as popular as accounting in SME market. Without it, less competitive in the market
- Customers expectance increase

CRM and the market

- 2 Major Streams
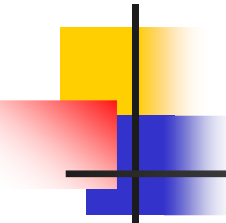   - On-Premises Software
    - Cloud Computering (Software as a Service)

CRM and the market

- **On-Premises Software**
  - Sold by Vendors
  - Software installed in own IT infrastructure
  - Higher Security
  - Usually Higher Initial Costs
  - Maintenance Costs
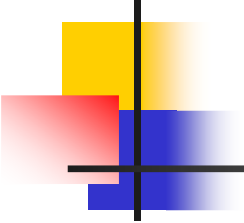 - Major Players : Oracle, SAP, Amdocs

CRM and the market

- Cloud Computer / Software as a Service (SaaS).
    - Sold by Subscription Per User Per Year
    - Vendor Provide Online Services
    - Lesser Initial Cost
    - Less Maintenance Involved
    - Major Players : SalesForces.com / RightNow / SugarCRM

CRM software and OSS (Open Source Software)

- ## What is OSS?

- ## Popular OSS CRM products

- ## CRM on the cloud
  - Brief Cloud Computing introduction

CRM software and OSS (Open Source Software)

- What is OSS?
  - Basic concepts of source and software
  - Difference between FOSS and OSS
  - To introduce the background
  - To elaborate the concepts
 - To list the characteristics of OSS

What is OSS? - Basic concepts of source code and software

Source Code Samples

```
// Create_account creates an account, deposits money,
   and returns an account
public account create_account(double balance)
{
   account my_account;

   // Instantiate a new object
   my_account = new account(balance);

   // Call the deposit method of our object my_account
   my_account.deposit(25.00);

   return account;
}
```

What is OSS ? - Basic concepts of source code and software

Programmer create source code and compile to Software
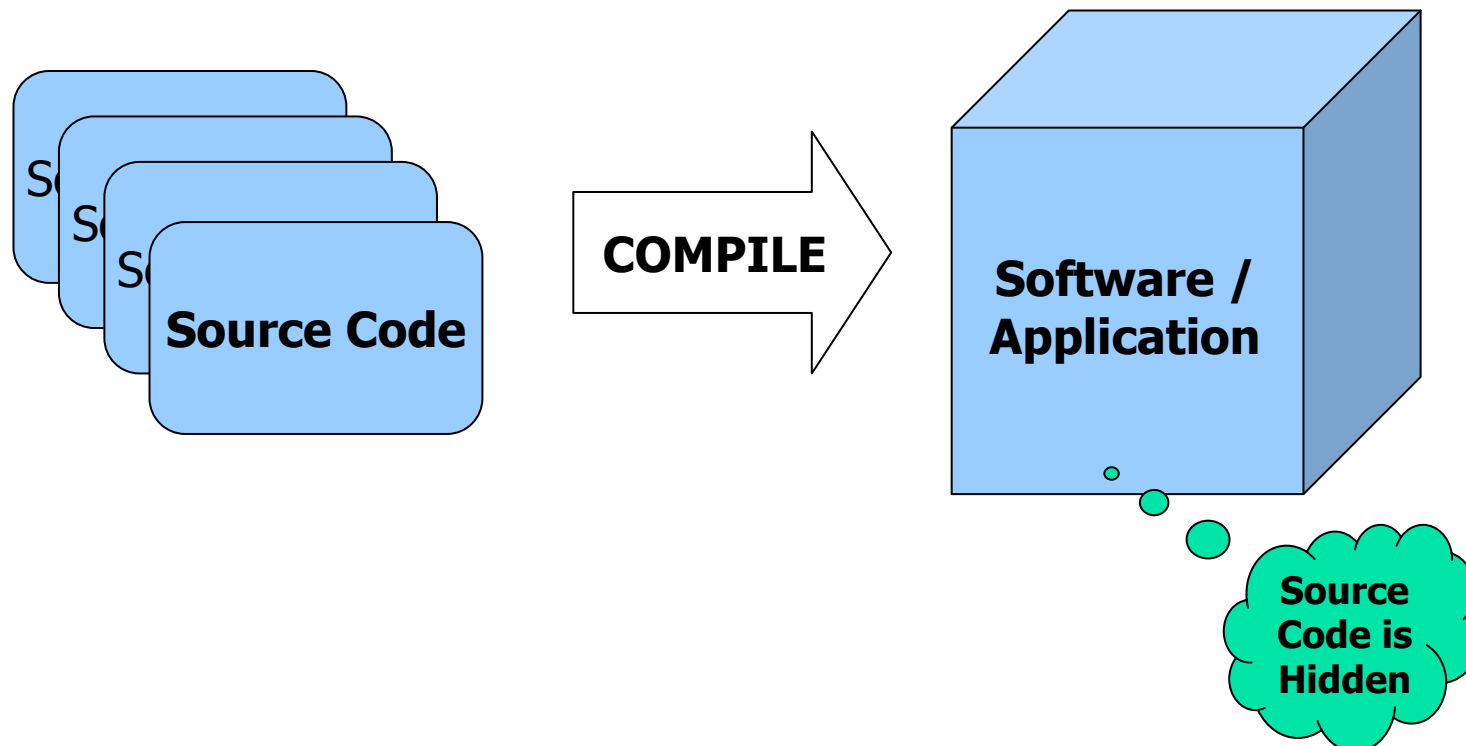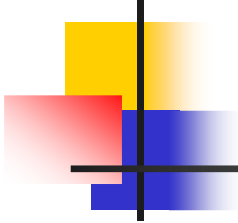
What is OSS? - Difference between FOSS and OSS

- Any software come with source code can qualified as OSS, so public can customize / improve / evolutes it.

- FOSS stands for Free Open Source Software (Free Software). People consider OSS equals to FOSS.

- Free Software mean freedom and not free of charges.

What is OSS? - Difference between FOSS and OSS

- Four essential freedoms For FOSS
  - The freedom to run the program, for any purpose (freedom 0).
  - The freedom to study how the program works, and change it to make it do what you wish (freedom 1).
  - The freedom to redistribute copies so you can help your neighbor (freedom 2).
  - The freedom to distribute copies of your modified versions to others (freedom 3).
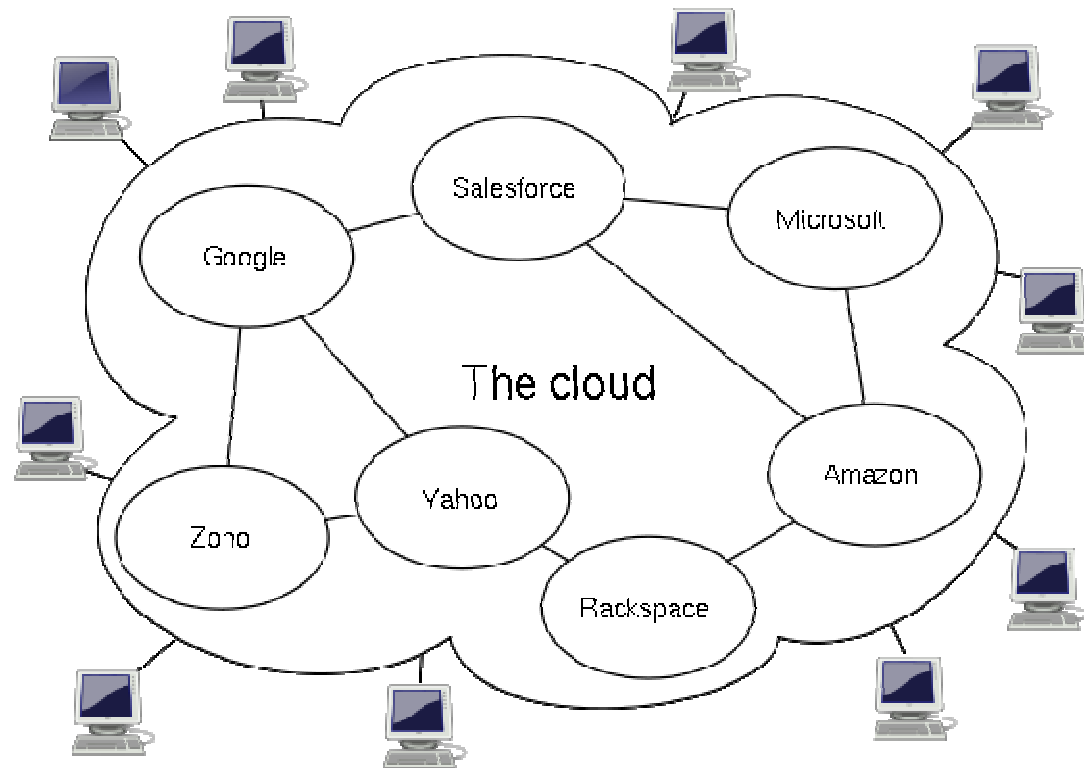
http://www.gnu.org/philosophy/free-sw.html

CRM software and OSS (Open Source Software)

- **Popular OSS CRM products**
  - SugarCRM
  - ZohoCRM
  - Compiere ERP + CRM Business Solutionb
  - vTiger CRM

CRM on The Cloud – Introduction on Cloud Computing

Cloud Computing

Services / Perform / Infrastructure offer from service provider through Internet / Network

http://en.wikipedia.org/wiki/Cloud_computing

CRM on The Cloud – Introduction on Cloud Computing

- Cloud can be public / private
- Cloud can have 3 models
  - Software-as-a-Service (SaaS)
    - e.g. Webmail
  - Platform-as-a-Service (PaaS)
    - e.g. Virtual Hosting
  - Infrastructure-as-a-Service (IaaS)
    - e.g. Firewall Hosting

CRM Software Basic Concept

- Terminology
- Data Modeling
- User Managements

# CRM Software Basic Concept – Terminology

- **Contact** – mean a person
- **Account** – mean a company or organization. Note, suppose an account must have at least one contact
- **Leads** – contact may be generated a sales opportunity. Lead can be new contact or existing customers
- **Opportunity** – term used for possible complete sales
- **Sales Pipelines** – A process to describe from lead to sales closed
- **Sales Stage** – the stage in sales pipeline
- **Activities** – Activity can belongs to Contacts, Account, Opportunities, Projects.
- **Campaign** – term used in Marketing Department for event or actions to recruit new leads
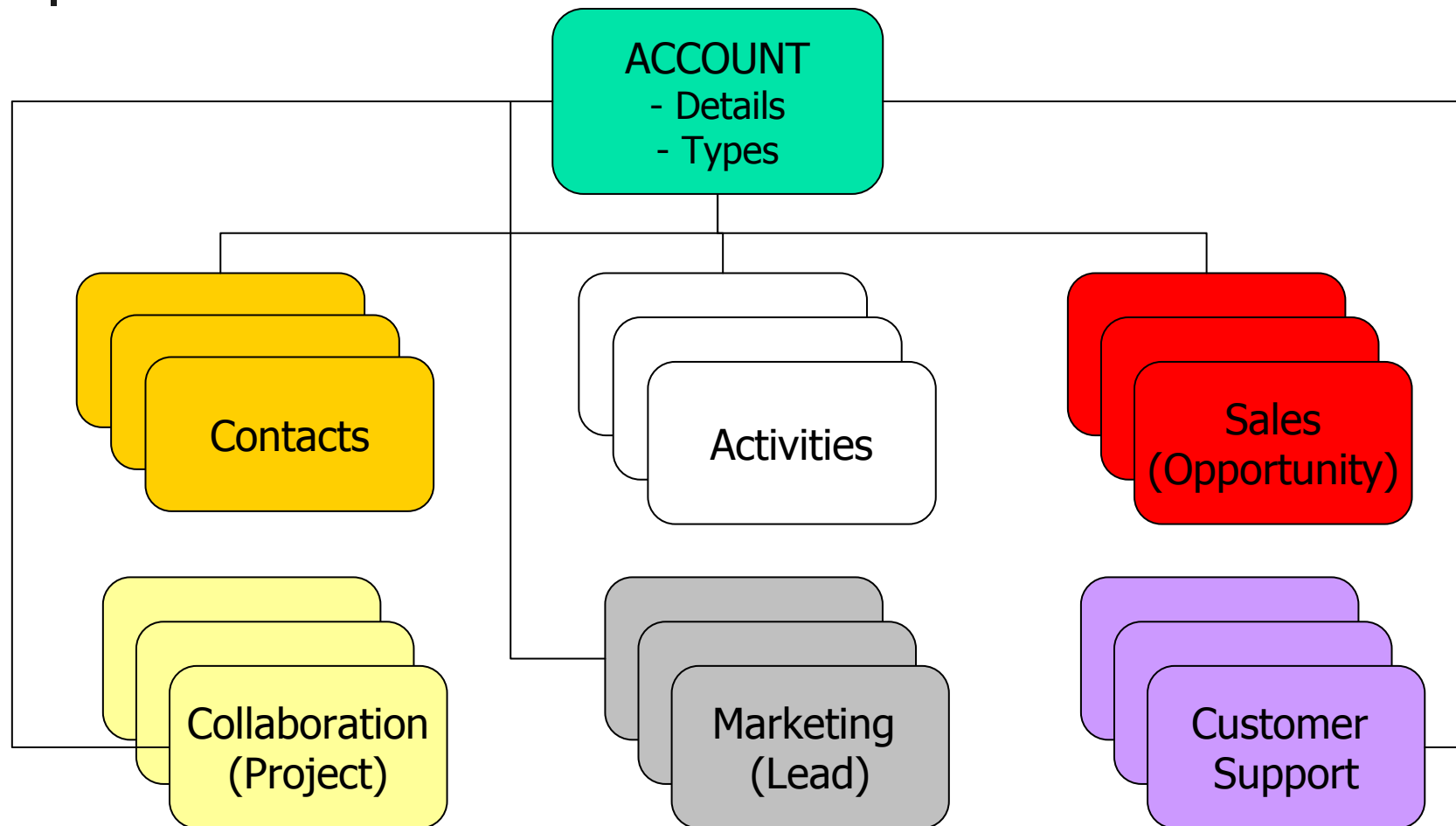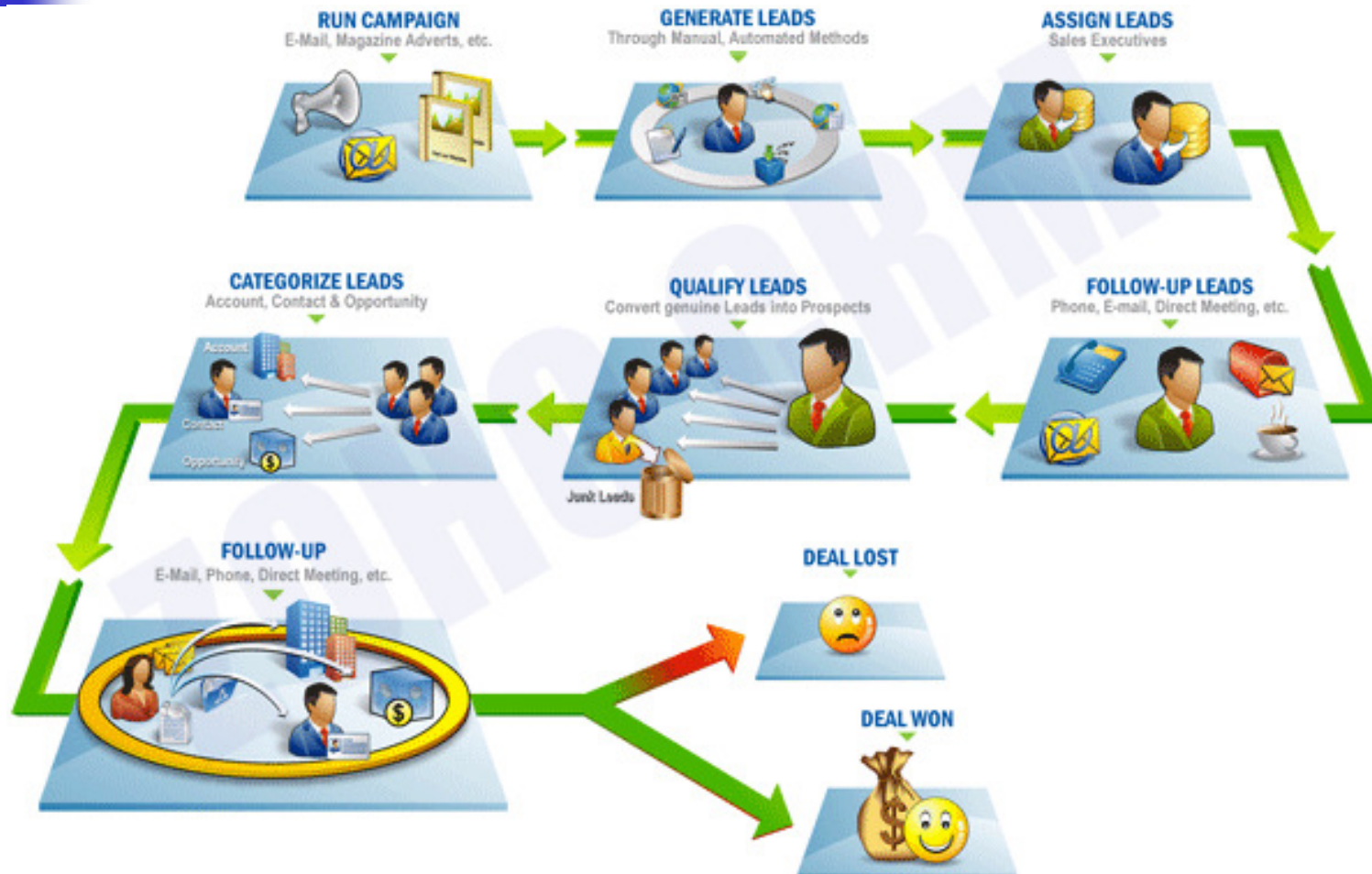
CRM Software Basic Concept – User Managements
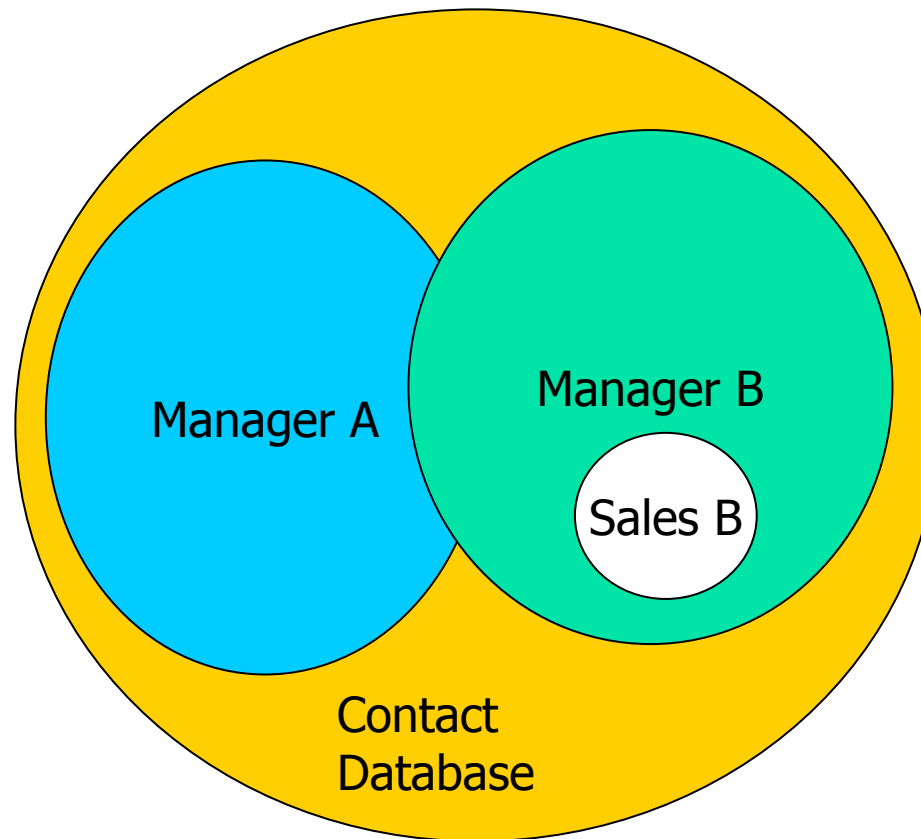
CRM Lead to Customers Process

CRM Major Processes For SME

Overview of SugarCRM

- Most Popular OSS CRM around 2 years
- In just two years, SugarCRM downloaded over 1,000,000 times
- And translated into over 75 languages including Chinese
- Over 400 complements and extensions have been contributed by our user community.
- 4 Editions
  - Community Edition – Open Sources License
  - Express Edition – Commercial License
  - Professional Edition – Commercial License
  - Enterprise Edition – Commercial License
- It covers both on cloud or on-site model

Overview of Zoho CRM

- Award-Winning, Complete CRM Solution
- Free of Up to 3 Users
- No Extensions have been contributed by our user community.
- Support 13 Languages including Chinese
- 3 Editions
  - Free Edition – Open Sources License
  - Professional Edition – Commercial License
  - Enterprise Edition – Commercial License

http://www.zoho.com/crm/zohocrm-pricing.html

Hand-on Training Session SugarCRM

- Install SugarCRM Community Edition
- Access SugarCRM
- Navigating the User Interface
- Major Modules Introduction
- Case Simulation
- Advanced Features Introduction
- Add-on / Extension Introduction

SugarCRM Training Session - Follow Online Documents

Install SugarCRM Community Edition

http://www.sugarcrm.com/crm/download/sugar-suite.html

Documents Online

http://www.sugarcrm.com/crm/support/documentation/SugarCommunityEdition/5.5/-docs-Application_Guides-Sugar_Community_Edition_Application_Guide_5.5GA-ix.html

Hand-on Training Session Zoho CRM

- Create Account in Free Edition
- Features of Zoho CRM
- Navigating the User Interface
- Major Modules Introduction
- Case Simulation
- Advanced Features Introduction
- Add-on / Extension Introduction

Zoho CRM Training Session - Online Workshop

Register Zoho CRM Free Edition

http://crm.zoho.com/crm/signup.sas?PLAN=fre