Special Report

Secrets of CRM success across a network

Authored By:
Shawn P. Stockman
Vice President of Business Development
Ceonex, Inc.

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Secrets of CRM success across a network

Organizations making the leap into CRM technology are often faced with vendors trying to sell them an expensive, "complete" enterprise solution based more on product features than on the organization's actual needs. Few vendors will consider small or modular installations. The "all or nothing" approach commonly overwhelms network professionals with unrealistic and often unnecessary demands on the network infrastructure.

Ceonex has developed a proven technology selection and implementation process that is affordable, scalable, low-risk and manageable for network administrators. We are willing to share our methods in order to educate the audience who can benefit most.

This Special Report, titled "Secrets of CRM Success Across A Network," will offer a step-by-step process toward creating a long-term CRM solution that can evolve with changing business objectives and technologies.

- **Step One** details a holistic organizational needs assessment process that prioritizes the business goals behind the decision to implement CRM.
- **Step Two** matches those organizational needs to technical functionality needed to work across networks and business units.
- **Step Three** outlines the criteria for choosing a solution and making the build-or-buy decisions for each desired CRM function.
- **Step Four** suggests ground rules for working with a technology partner that puts the power in the hands of the network professionals charged with achieving a satisfactory return on their CRM investment.

SHAWN P. STOCKMAN

Vice President of Business Development

Ceonex, Inc. (www.ceonex.com)

Stockman began consulting with Ceonex in 1998 and became VP of Business Development in 2000. Ceonex provides information technology-based business strategy solutions that focus on prospecting, converting and retaining clients. Ceonex offers a full scope of prospect, customer and partner relationship management - Internet Development services ranging from brand development and implementation on the front end to information architecture, application development and systems integration on the back end.

Shawn Stockman has over 15 years of business development experience ranging from direct marketing to CRM in health care, financial services and information technology industries. Stockman began as a guerilla marketer and evolved into a strategist for large scale integrated marketing projects (direct mail, e-mail, web marketing, strategic alliances). He has conducted workshops and has spoken nationally on data-driven marketing, CRM and sales force automation.

Shawn can be reached at shawn@ceonex.com

Introduction

The term Customer Relationship Management is about as overused as total quality management was in the 1980s. Nevertheless, it holds allure, promise and obligation. If your company is not striving to achieve some degree of CRM capability across your lines of business and throughout your departments, your organization is certainly behind the times, if not critically crippled. Most are making an attempt, but at what cost?

Let's face it there is no such thing as "future-proof." You can plan, you can remain flexible to what's coming, but there is no way to insulate your company from the technology future. A common practice is for vendors to convince companies that it is in their best interest to buy one gigantic installation of software and hardware that serves all lines of business, all departments and divisions all that once and call it a "CRM solution."

The truth is, no matter how complete your "solution" is, eventually it will become obsolete.. Changes in organization goals, structure or ownership will affect the usefulness of certain parts of the solution. What constitutes a complete solution today creates roadblocks to dynamic growth as a company later. A modular approach to solving CRM challenges affords the resilience necessary to stay dynamic without breaking the bank.

This report outlines a step-by-step process toward creating a long-term solution that can evolve with changing business objectives and technologies. From the RFP creation process to the build-or-buy decision process, this report will help prepare readers to embark on the painful journey of building CRM processes and infrastructure across a network.

Defining CRM

CRM is an approach to interacting with customers and prospects to provide a seamless flow of information and service to the customer from marketing, through sales and customer service for the entire customer life cycle. CRM initiatives typically are built upon a central customer database that integrates data from every form of interaction with customers to enhance relationships.

Goals of CRM

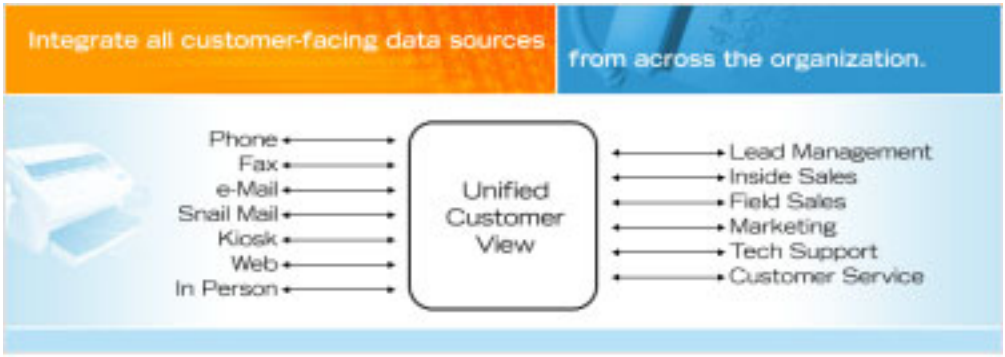
Why pursue CRM? Most companies expect CRM to add stability through increased customer retention and long-term profitability through increased efficiencies in sales (higher conversion rates of prospects to customers through prospect relationship management), marketing and product development. Industries that can benefit most from investing in CRM technologies are industries in which the customer has two characteristics: high value per client account, and highly available information about the customer's needs, wants and buying history.

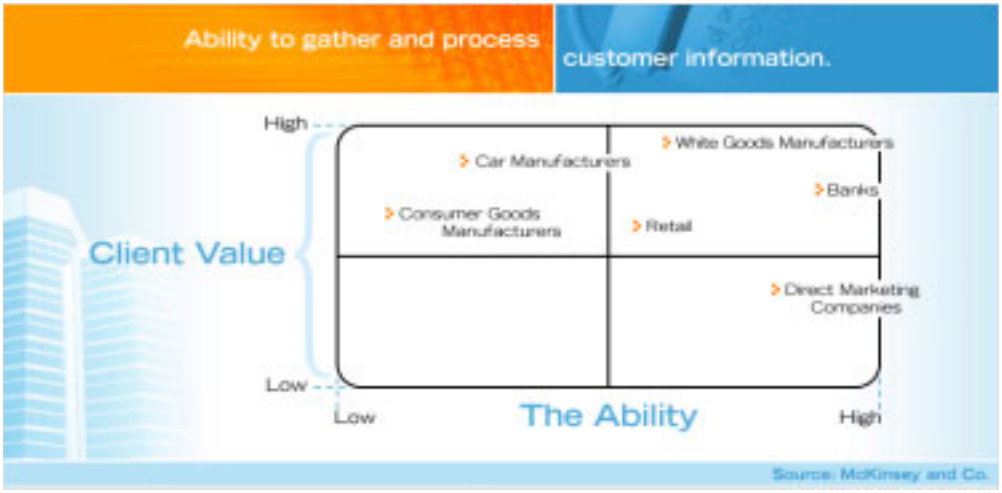
Companies expect to achieve high sales-conversion rates, high customer retention and high profitability per customer by providing:

- The right product (or service)
- To the right customer
- At the right price
- At the right time
- Through the right channel
- To satisfy the customer's need or desire

Your ability to achieve these goals depends mostly on the availability and usability of information about your prospects' and customers' buying habits and preferences. To increase your return on investment (ROI), the right information technologies are critical to:

- Know who your customers are and who your best customers are;
- Know what they won't buy and stimulate what they will buy;
- Time when and how they buy;
- Learn customers' preferences and make them loyal customers;
- Define characteristics that make up a great, profitable customer;
- Define the best channels to address a customer's needs;
- Predict what they will buy in the future;
- Keep your best customers for many years;





The secrets of failure

Before we get to the secrets of success, let's look at the secrets of failure. Gartner recently found that as many as half of all CRM implementations fail. Building a customer-centric company takes time and planning, and a dedication to change from the front through the middle and back end of a company.

According to CRM experts Don Peppers and Martha Rogers the most frequent mistake that companies make is to confuse a CRM strategy with a technology implementation. They claim that 50 percent of CRM projects fail. The difficult part of any CRM initiative is making sure that a company's culture is ready for a customer-centric focus and that the executives are onboard. Then technology becomes an enabler of the one-to-one communication Peppers and Rogers have been touting for years: Web sites, call centers, mobile devices, and other media become opportunities to develop profitable customer relationships that will put your company in the successful half.

Ceonex embraces the basic action areas that Peppers and Rogers say will make the difference:

- **Organizational change:** A single customer relationship typically is handled by several departments (even prospect data is shared among sales and marketing in the least). Data integration, interdepartmental communication, and someone to oversee these processes are critical to success. Smart outsourcing for technical projects achieves specific goals while building internal expertise for tackling future projects.
- **Metrics to measure success:** The traditional financial measures of success commonly used in a transaction-based environment are often inadequate. A customer-based company must align its branding, research and development, compensation, budgeting, and incentive policies according to a customer-centric model. Human capital becomes a tangible metric.
- **Culture change:** Long-term relationships outweigh short-term sales. A customer-focused company should be prepared to make recommendations that are in the customer's best interests, even if they conflict with the short-term interests of the company. Ethics must transcend financial goals.
- **Channel:** For company that are moving their products or services through channel partners, establishing relationships with end users and channel partners is crucial. Partner relationship management introduces a new burden (in terms of data) and opportunity for channel marketers.
- **Transition planning:** Any company engaged in becoming customer centric must be aware of the transitional process, including a step-by- step awareness, a clear funding strategy and attainable goals. This process supports a modular approach to building network infrastructure for CRM projects rather than introducing sweeping changes all at once. Whether you are reviving a stalled implementation or launching a new one, this is where the fine line between success and failure is often drawn.

Step One

Conduct a holistic, organizational needs-assessment process that prioritizes the business goals behind the decision to implement CRM.

Understand organizational needs

A working knowledge of organizational needs is essential to the success of any project.

A good vendor will discuss the project with the client often in the early stage to learn the client's strategy and to develop detailed specifications. This is an iterative process, starting from outlines and working down to detailed specifications. It is a learning process on both sides: You know your business and what you want to accomplish and the vendor should know the technologies that will be used to achieve your goals.

While clients often are eager to get going and have tight time frames in mind, this planning must be done thoroughly: if the

foundations aren't well-established, the structure built upon them might suffer later.

The goal of this process is to understand the long-term goals behind defining and managing prospect and customer relationships. A common mistake is to leap to a list of desired features (usually provided by vendors) and to evaluate CRM solutions based on a checklist of which solution providers offer the most features on the list.

Start with a Data Check:

What data is in-house?

Where is it?

How is it used now?

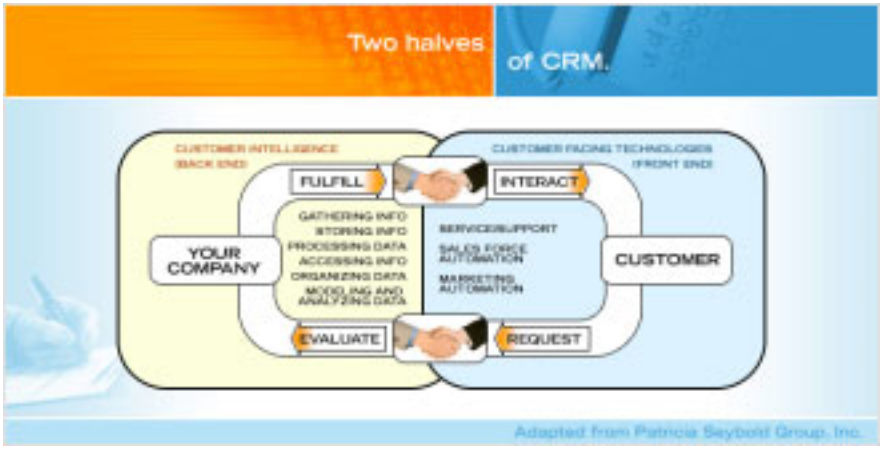
How can we leverage it?

What should we add to it?

Start by taking a step back and defining what you hope to accomplish with different kinds of information. Here are some sample to jumpstart the prioritization process:

- *What is the value of the customer and prospect base for each CRM initiative?* Every line of business (and probably each category of services or products) has a customer base with its own lifetime value. For most companies, CRM starts with first defining customer bases, then determining a value of each before aggregating those values into a companywide customer value that can be used to justify a certain level of expenditure for CRM over the long term.

- *What is the optimal amount of capital appropriate to protect or maximize the customer value base?* Protecting a customer base can take all forms, and one must start with an understanding of where the threats lie: competition, attrition or complacency? Retention can be a function of all three and several other factors, which might affect the use of (and therefore the systems needed for) customer information. Maximizing a customer base simply might mean maximizing the share of the customers' wallet, which could translate into upselling and cross-selling products or services. In this case, leveraging a salesforce automation system should be among the top priorities for the new CRM system. Either way, you must come up with a number that provides a reference point for what makes sense to spend on the project, relative to the potential value of the customer bases to be served.



- *Which provides the greatest return in customer value in the shortest amount of time? And in the long term?* This is simply a way to prioritize a phased approach so that the project is getting maximum ROI. Get the low-hanging fruit first and work your way up. Sounds obvious, but it's not. What is often the easiest has the lowest ROI, and it might make more sense to tackle a more difficult phase earlier to generate more financial return quicker. In the ideal world, the order of a phased approach would be determined by whatever it takes to achieve a self-funded project (or as close to self-funded as possible).

- *How would these CRM initiative priorities change over time, given a change in the key drivers of customer value?* Let's say you have created a phased approach that touches Business Units A, B and C, and the sequence of development work is based on profit margins among products sold by these business units. Assume that Unit C creates a highly profitable upgrade to its existing products that pushes the potential value of its customers above Units A and B. You need to be able to capitalize on dynamic changes in your market by shifting the focus of the project to the area with the highest return on the development dollar. One more reason why a huge implementation process that slowly works it way through an organization based on factors other than the business climate is less attractive than a phased project created with change in mind.

- *What single metric can all parts of an organization utilize to measure their progress in enhancing customer value?* Chances are, this metric has not been defined or valued yet by your organization. It might be something like a ratio of revenue growth as it pertains to the increase in the raw numbers of customers or simply a ratio of prospect-to-client conversions. This metric should be reflective of the organization's business reasons for contemplating CRM in the first place. It could be a measure relative to product flow, customer service, production efficiencies or the reversal of negative

trends in profit per customer or lines of business per customer account. Either way, it should be a metric that at the end of each year can be a simple measure of progress for the organization as a whole and each department whose activities directly or indirectly affect the metric.

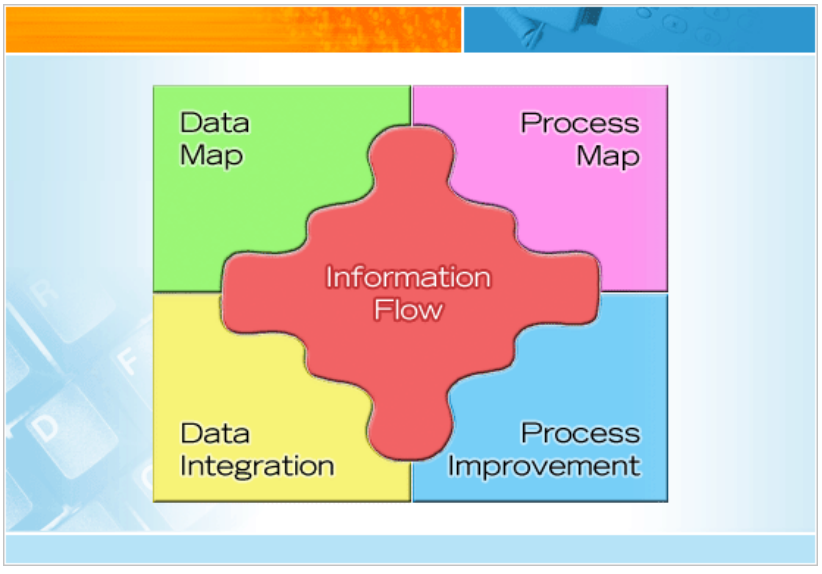
Step two

Match organizational needs and workflow processes to technical functionality needed to work across networks and business units.

Once you have a definition of the long term goals specific to each business unit, you need to know which departments handle that information, what their processes are and finally, what features might be able to integrate and work with the information in a meaningful way. Only then is it time to sort out how each feature and functionality will be acquired, either through off-the-shelf technologies or built as a customized application.

Why so much detail upfront? Imagine a company named ZZStor that sells data storage products through channel partners that ultimately are installed by systems integrators. They need to develop an extranet that allows password-protected access for several audiences to multiple offerings:

- Product News (Available to all)
- Events (Some open to the sales department, others to the service department, others to channel partners)
- Training (online training open to certified service technicians)
- Sales-incentive programs (For inside sales only)
- Technical product details (For sales, channel partners and integrators)
- Technical Service (Only for Systems Integrators and Installers)



Suppose a channel partner lands a big deal in Germany. The field rep logs on to place the order and starts in motion a string of automated processes across several networks. The field rep clicks "Submit" and triggers rules about configuring bundled products to fulfill the order; it checks ZZStor's inventory and the inventory of companies who make the other bundled components of the overall system. Four companies now have purchase orders with the same end user shipping address and channel partner purchasing information. That means it goes into ZZStor's billing system, the channel partner database and the end-customer database. The field rep checks off which systems integrator will be handling the deal, and a notification is sent to ZZStor's installation team in Germany that the order will be arriving in three weeks. It checks their schedules and books an installation date, then sends a confirmation back to the field rep. This transaction qualifies the channel partner for higher levels of co-op marketing, and its marketing department receives the good news from ZZStor's channel marketing system.

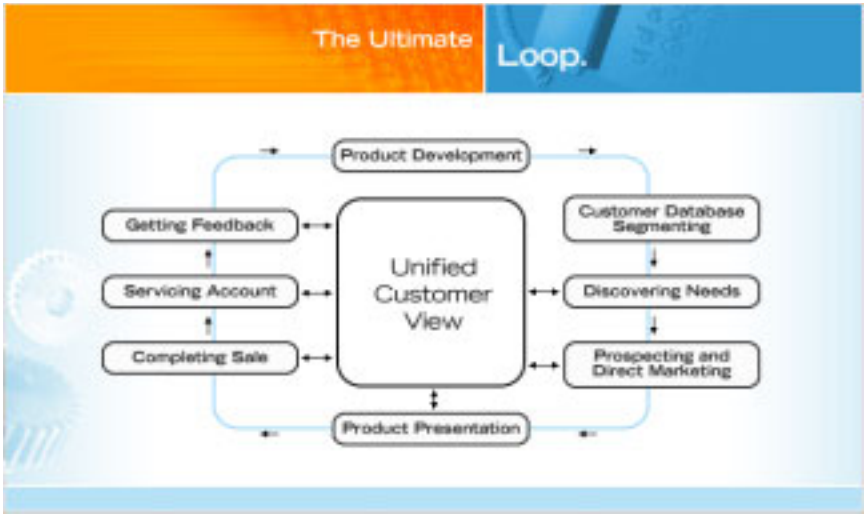
This system is not fantasy. It is at work today in one of the largest data storage companies in the world. The point is that a series of networks are linked by a relationship management system tied to several levels and categories of relationships. We mention this to emphasize the importance of knowing who handles which information and for what purposes. You can't get to this level of integrated workflow automation without mapping today's reality and tomorrow's dream.

The Ceonex Assessment Process is based for the most part on Dick Lee's practical approach outlined in his seminal book, "Strategic CRM: The Complete Implementation Manual." Here's a overview of how to go about this:

Data map: Look at how customer information flows through the organization from the point of entry to either a full customer profile or dead account. It might help you to visual flow charts for each customer.. Although it might seem like purely transactional data, also consider warranty use data, customer service logs (to see what customers or types of customers use the most resources after the sale), or sales and marketing data. For example, you might notice that the information about customers in marketing's prospect database for a year differs from the information in the sales department about customers who made quick purchases. Such differences might

point to either a breakdown in information flow between the two departments or to a difference in the behavior of customers. Did they buy different things or more things? Did they eat up more resources before or after the sale that affects their profitability?

Process map: Build a process map that overlays your data maps to see how customer information is moved through your organization and who moves it. This can be a very arduous process, but one that promises huge rewards. Inevitably you will find dead pockets of information where valuable facts about customers are not being shared with other business units that could benefit from them. Or business-to-business industries might find that separate departments are attempting to gather the same information from different departments of the same customer-and getting different results! One of the easiest ways to think about mapping a process comes from an example of a local chamber of commerce who set out to prove that tourist dollars flow through the town's economy with an impact. They started by giving a few local tourist attractions $10,000 in $2 bills to hand out while making change. By the end of the first week, every business in town was flush with $2 bills. The same principal applies when trying to decide which data are meaningful and trying to map the processes by which that data moves through the organization. Once you map the processes, you will start to see opportunities for improvement.



Process analysis: CRM will affect most processes in your organization. Start with an analysis of how processes within departments are tied to other departments. Identify inefficiencies, then develop a strategy to improve those processes. Don't waste time fixing a bad process, and never automate an inefficient process. Often, the lowest level employees have the greatest affect on processes affecting data, in terms of quality and flow. Sales people are notorious for creating bottlenecks of prospect and customer information, partly because of the kinds of personalities drawn to sales careers (not necessarily detail and process-oriented), and often because of a lack of prescribed processes to guide them.. For example, inaccuracies in contact information, plague sales and marketing departments when a sales person has typed in partial or incorrect information that the marketing department wants to use for cross-promotional or loyalty-building purposes. It's tough to maintain your credibility when the "personalized" form letter is sent to Ms. Carol Smith when it's Mr. Carole Smith, the founder of the company, who should be reading that expensive mailing. Process will prove priceless.

Data Integration: Where is your data spread throughout the organization and who controls it? Find separate prospect and customer data repositories and develop a strategy to link them. You need to create the "Ultimate Loop" of customer data: create a process to gather all contact information, purchase history, product preferences, and correspondence gathered during the relationship and make it all accessible to all departments.. For example, at the front end of the organization, marketing buys a prospect company's contact information, feeds it to sales, which tracks down the right contacts and makes the sale. The sales department provides billing and shipping information to the billing department that sends an invoice to the customer. The service department records warranty, maintenance and product feedback information, and passes that along to the R&D folks developing new products. R&D would like to know what the engineer from that last client company had to say about the latest design change. All this information needs to be integrated into a single customer view so that all departments can see what all the departments of the client's company have said and done that affect the relationship. On the consumer side, it might be a matter of trying to consolidate information from the call center, the Web site and the service center so that customer communication ends up in one destination so that any customer service representative interacting with a customer will know the complete history of the relationship.

Drafting detailed technical specifications and a development plan

Once your assessment process has defined the organizational needs, drafting detailed technical specifications is a top priority. The goal is to prioritize elements of the project to enable the team to start to define the probable phases of the project.

There are two deliverables from this process: detailed technical and functional specifications and a detailed development plan. Specifications outline the applications needed to achieve the business goals identified earlier (for both internal and external applications). The most complicated solutions will require the most discovery process, and probably will be the last to be started. Much of the initial discovery process will determine future approaches and costs.

The development plan will be drawn from an outline of the information architecture and the data flow between departments (and systems), and ultimately will place each development task in sequence for the overall project. In this plan, corporate priorities help define the phases so that the top priorities get attended to, regardless of whether the urgency stems from highest short-term ROI or the need to curb customer attrition. Of course, infrastructure also plays a role in the order of development tasks, in the sense of building the foundation before the applications running on it. The planning process involves establishing time frames for each task, layering the start dates to match launch dates that dovetail with the right infrastructure being in place. Any development firm worth its salt will share a Gantt chart with you that depicts start and finish dates for key elements of each phase with milestones tied to specific dates and responsibilities assigned to specific people or teams (both internal and external). That document will enable you to ensure the developers hit their mark.

Step three

Determine the criteria for choosing a solution and making the build-or-buy decisions for each desired CRM function.

A key consideration in your CRM quest is how each audience or group of users will interact with the systems you build. For example, internal and external clients require different levels of password-protected access to information and different standards for interface or connectivity.

Here are the main customer requirements for architecture that are important to consider:

- **Reliability –** Uptime is everything. Make sure your provider has adequate provisions for a framework for an IT infrastructure that includes redundancy and failover of Web services to keep your CRM application running, even when individual hardware failures occur. These systems are most important for call centers and other customer-service information applications (such as your Web site) that might be customer-facing on a 24-hour basis.

- **Scalability –** All companies want to grow. Instead of scaling up by buying bigger and more expensive hardware, you should be able to scale in two ways. The first, called scaling vertically, means simply upgrading the current hardware that's in place by adding additional CPUs, more RAM or adding additional hard-disk space. The second method is called horizontal scaling, which is achieved by adding machines and then distributing processing requirements across all machines. The modular nature of Web-based services creates an environment in which you quickly and cost-effectively can scale up your enterprise application by upgrading existing hardware or adding machines and then distributing the application across multiple servers. Scalability might be the greatest requirement for a phased CRM project.

Pitfalls to Avoid:

1. ***The eternal implementation process***
2. ***Adding objectives midway in the project***
3. ***The 'have it our way' vendor***
4. ***The proprietary system that doesn't work with anything else***
5. ***The technology experts who don't know beans about marketing***
6. ***The marketing experts who don't know beans about IT***
7. ***A lopsided or oversized team***

- **Accessibility –** Companies need access options to support a variety of user types. For example, they may be on a LAN, WAN, or part of a remote office with access to the corporate network via long-distance dial-up lines, frame relay, or VPN. Sales teams often need to connect remotely to the salesforce automation system on the corporate network.. In the case of the remote user, the Internet is usually the easiest way to connect. Other types of users, including field sales and service technicians, need to download information and take it to the field, while continuing to enter additional data. They need to synchronize their mobile machines with the corporate network, in which case client-side processing is probably the most advantageous.

- **Flexibility –** It is preferable to be able to change existing capabilities to support your work flow, changing the business rules to ensure your processes are followed, or vice

versa. Ideally, you should be able to create trigger events in the system that automatically notify other applications to run under certain conditions. For example, when a customer orders a particularly large order that changes their status in your system, perhaps moving them into a new category of customer, they should get special rates or other treatment. The ability to build the business rules into the system so that r the new rules can be identified over time is essential to a closed-loop process of collecting and applying prospect and customer information.

- **Rich user experience –** Many of your prospects and customers are looking for advanced functionality with intuitive workflow and simple navigation. You may find that your internal clients are more likely to use a Windows-style interface and the external clients may need a browser-based interface. For customer self-service and partner portals, browser-based interfaces make the most sense because they can be accessed from any HTML compliant browser. Knowing how the intended audience will use your system will influence how you create navigation that fits into their work flow. Knowing how each category of user will connect to the system will affect your decision to serve applications over the Web or to use a smart client with the ability to leverage client-side processing ,thereby reducing the number of server "round trips." This efficient use of bandwidth improves both performance and the user experience.

- **Affordability –** It might seem obvious, but worth stating: a modular approach typically is an affordable approach. Modularity helps in planning for funding the CRM initiative by budgeting for each phase over time. More importantly, however, is the ability of a modular implementation to shift gears as discoveries are made along the way that require adjustments. Costly mistakes are avoided, and nonessential work is minimized. A key factor in keeping any CRM project affordable is to be able to initially deploy on a single server and then scale by adding inexpensive hardware - rather than replacing the initial server with one that is more expensive. Second, the use of standard Microsoft servers will make finding skilled and experienced administrators easier and less expensive. Microsoft provides easy access to certification programs, and local training centers often offer matching services to track down certified professionals with the skills you need.

- **Security –** The need for secure systems will never go away. The more open your system is to customers and partners, the more vulnerable it is. This is a topic worthy of an entire special report , but here are the highlights of factors to consider:

Infrastructure security

- Use of a secure facility for all servers.
- Front- and back-end networks with the "back-end" network completely isolated from the public.
- Read-only file systems separate from the public server.
- Careful selection of the applications that will run on the server.
- Use of only encrypted protocols for maintaining a server.
- "Signature" checking for system binaries.
- Port scanning of all open ports on the machine.
- Firewall.

In addition to the above initial set-up items, there should be a plan in place to maintain and monitor security over time. Here are a few tips :

- **Keeping a system properly patched.** It should be noted that routine patching for nonsecurity reasons could open new security holes.
- **Monitoring of security bulletins from a variety of sources –** New vulnerabilities are always being discovered and have to be dealt with.
- **Intrusion detection –** Monitoring all traffic in stealth mode looking for patterns typical of hacking.

Application security

In keeping data secure, no amount of infrastructure security helps if you don't control access to your application. Application security makes sure that specific users, both within your company and your customers, get to see only the data they are authorized to access. To enforce application security Ceonex uses these techniques:

- **Encrypted communications –** all packets containing sensitive data are encrypted.
- **Authentication –** an application must be able to trust that it is speaking with an authenticated user.
- **Security integral to the application –** once you are sure you can identify a user, you have to control their access to particular features and data. Don't rely on browser authentication when checking to see if a user is authorized for a specific function.
- **Message passing to isolate the database server –** this is a common technique used in high security applica-

tions such as those employed by banks. It adds a layer of complexity and cost-and security.

Step four

Ground rules for working with a technology partner that puts the power in the hands of the network professionals charged with achieving a satisfactory return on their CRM investment.

Sometimes there is a fine line between a vendor and a partner. At other times the differences between the two are vast, but the success of both are intertwined. The reference checking outlined below is evidence of how the industry works. Word of mouth has generated the majority of our business for years, and remains one of the few ways to separate hype from reality among vendors trying to sell you services for CRM projects.

A response to an RFP must address the specifics of a project, but you must feel comfortable with the potential partner as a company. You should be confident in their team's credentials, knowledge and skills. Their managers should be highly experienced individuals that will explain all of the capabilities, technologies, possibilities and core competencies - yet also listen and learn everything about the client's industry, competition, vision and organizational needs.

Any organization evaluating a potential partner wants to know several things, including:.

- *Can this partner get done what we need to get done in the time frame we need?*
  It sounds simple, but it's essential: Get references. And call them. Get a complete client list and call some that are not listed as references. Chase down the people who worked with this provider and get the inside scoop. Make sure you call more than one company, just in case you get that random aberration.

- *Can we work well with this partner?*
  Communication is the most critical factor in having a positive or negative experience during your implementation. How often will they give you a progress report? (Don't be afraid to ask, "What have you done for me lately?" Depending on the project, weekly or biweekly might not be too much to ask) How inclusive is their development process? Will they show you draft plans with Gantt charts that outline when each step of the project is complete? Is someone available as an on-call contact? Ask for his pager and cell phone number.

Vendor Evaluation Checklist

Category	Weight
Implementation Resource Requirements	
License Fees	Critical
Implementation Costs	Critical
Software Maintenance Fees	Important
Operations/Administration costs	Critical
Costs for Future Modules	Critical
Vendor Stability & Viability	
No. of years in CRM industry	Important
No. of total employees	Less Important
No. of employees/staff to be assigned your project	Critical
No. of implementations	Important
Vendor Support	
Training and Education	Critical
Technical Documentation	Important
Technical Support Services	Critical
Vendor Contractual Requirements	
Source code in escrow	Critical
Can we modify source code	Critical
Professional services offered	Important
Payment terms, conditions	Less Important

- *Will working with this partner produce value for the money spent?*
  Will this partner guarantee to be on time, on budget? You don't always get what you pay for. The state of California learned that when it recently was overbilled tens of millions of dollars for software licenses for more "seats" than they have employees. Never count out the smaller players. Without the overhead that large national vendors have, small shops can not only come in under the rates of bigger companies, but will devote more people to projects. Their stake is bigger in your project, because a negative reference could put them out of business. Often the amount of attention and devotion to the success of your project will

far surpass what you would get elsewhere. Speed has value. Even if the rates are the same, an efficient, phased project that can correct for changes in strategy or business focus as it is rolled out usually provides a better ROI than a giant implementation that is less capable of accommodating corporate change.

- *Is this partner going to be around for the long haul?*
  A long history does not ensure a long future. Arthur Andersen is proof of that.. A firm with three to five years under it's belt with solid project experience and a stable team is perhaps more viable than a behemoth whose employee turnover rate rivals the inflation rates in most developing nations. Key indicators include whether a company appears to be positioning itself for acquisition rather than focusing on providing the service they are in business to provide. Are they posturing for shareholders or is it a private firm with the freedom to do what needs to be done for the sake of the success of the client?

- *Do they stand behind their promises?*
  Will they guarantee to deliver on time and on budget? If your potential partner is not willing to agree to strict parameters regarding milestones tied to compensation, then their confidence in hitting their mark should tell you something. Ask their other clients and get it in writing.

- *Will your organization become the biggest obstacle to your success?*
  No partner can make this happen on their own. You have to do your part, too. Most projects require the availability of client staff and executives to participate in the needs-assessment process in order to get a read on the business goals that are driving your CRM effort. If key people are not made available, no partner can deliver on time. There are few types of corporate change initiatives as labor intensive across all lines of business and among so many levels of employees as are CRM projects. The commitment to seeing it through must exist from the top of your organization to the bottom in order to let a partner come in and do its job.

Consultative role

Look for a partner whose approach to your project is an educational one-all involved parties should learn something that will benefit the resulting project. Many organizations unfamiliar with the technical aspects of CRM development projects also are unfamiliar with how their business goals translate into site design, architecture, software and hardware choices. Credible partners are sensitive to the possibility that their position as an experienced vendor carries with it the ethical responsibility to educate their clients and inform them of the best solution, even if it means a smaller project. Only if the client knows the possibilities can he utilize them to their benefit and realize his organization's CRM potential. The organization should be stronger at the end of the CRM project than it was before the project. The right partner can strengthen your organization while empowering it with the technology needed to reach your s objectives.