

## Strategic Planning & Customer Relationship Management Value Added Network - Telecoms Provider

### Introduction

In the international business to business (B2B) space, there is a continued and growing need for a more effective and refined customer experience. An area that is now a key strategic driver for many different international sectors, causing organizations at the cutting edge of technical innovation to reappraise their business process models. With the ever-increasing expansion of channel, the early identification of the needs and demands of the corporate customer has now become more central. Equally, the speed of response to satisfying these demands, in many instances, requires change to the traditional customer relationship functions.

### Case Study

A global value added network and media service provider commissioned Nucleus to perform an independent impartial audit review of their Customer Relationship program initiative. The program was focused around the client's corporate sales and marketing divisions that serve their corporate clients and markets.

The audit review included how other extant systems were integrated with the chosen Customer Relationship Management (CRM) platform.

- To create an environment that was marketing led rather than sales led. This latter point required a degree of Change Management with the reorganization of roles within the organization.

Current trends revealed that the customer base embraced the concept of different methods of purchasing, such as the internet, desk-based services and third parties franchise offerings with an umbrella of services, as well as buying face to face.

#### **Moving Forward**

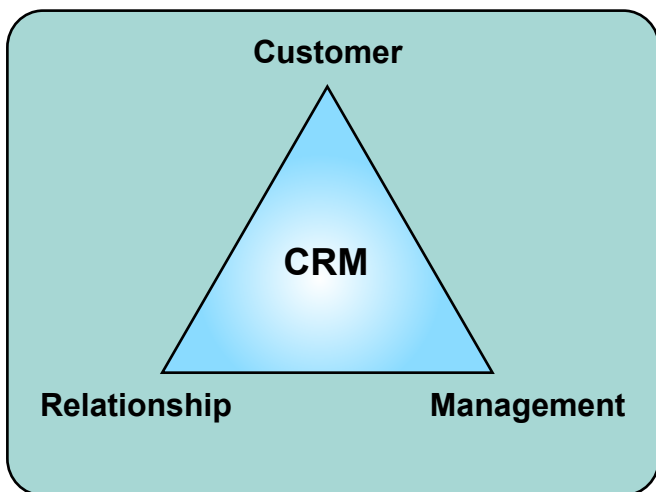
Nucleus initiated the audit with a review model. In collaboration with two key stakeholder directorates, the learning aims, scope, and management context in moving forward was agreed. This provided the relevant perspective to understand the current CRM approach against a backdrop of strategic change and improving management effectiveness. The program audit model included:

- Strategic Planning,
- Program Governance
- Organizational Development, - Marketing and Sales Integration
- Change Management, Training
- Technology Platform,

thus ascertaining the effectiveness of the functionality against the requirements of the business.

The Audit provided analysis and recommendations on:

- Corporate priorities functioning as the key foundation.



The independent and impartial program audit addressed key business drivers including:

- The need to establish a marketing-led 'Demand Management' set of processes (pipeline).
- Increase channels whereby customers could make contact with the organization.

- The use of metrics in the management of business benefits analysis.
- Current management programs in order to establish whether the processes effectively met the current and future needs of management and staff responsible for marketing.
- The effectiveness of change management across the business including marketing functions.

- Business Process Capture and the links between business processes and systems design.
- Information, technology platform and integration recommendations

The recommendations of the audit were far reaching taking into account all functions within the organization from to senior management level through to transactional operators.

### Results

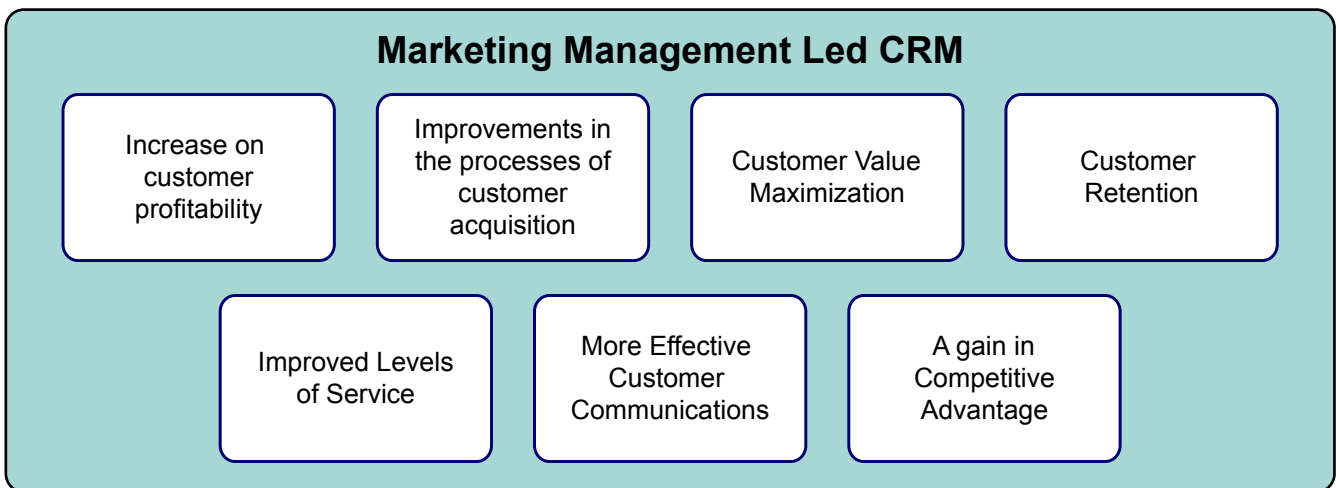
The review provided:

- Much needed links between Marketing Management and IT strategy.
- The need for all transformational programs to remain within the overall strategy for Marketing and Sales.

- The requirement that process and technology designs needed alignment in order to ensure synergy and effectiveness.

This work also introduced the initial performance management scorecard measures.

The benefits were prioritized as shown in the following diagram:



## Conclusion

The organization took forward a CRM program that was more integrated with both marketing and sales allied to an increase in their channels of communication.

Nucleus advised the organization at all stages of the process, and provided strategic and technical input to assist in the development of detailed specifications including the strategic integration of platforms.