CRM Data Methodology & Best Practices

WHY HAVING A CRM IS IMPORTANT FOR ANY ORGANIZATION

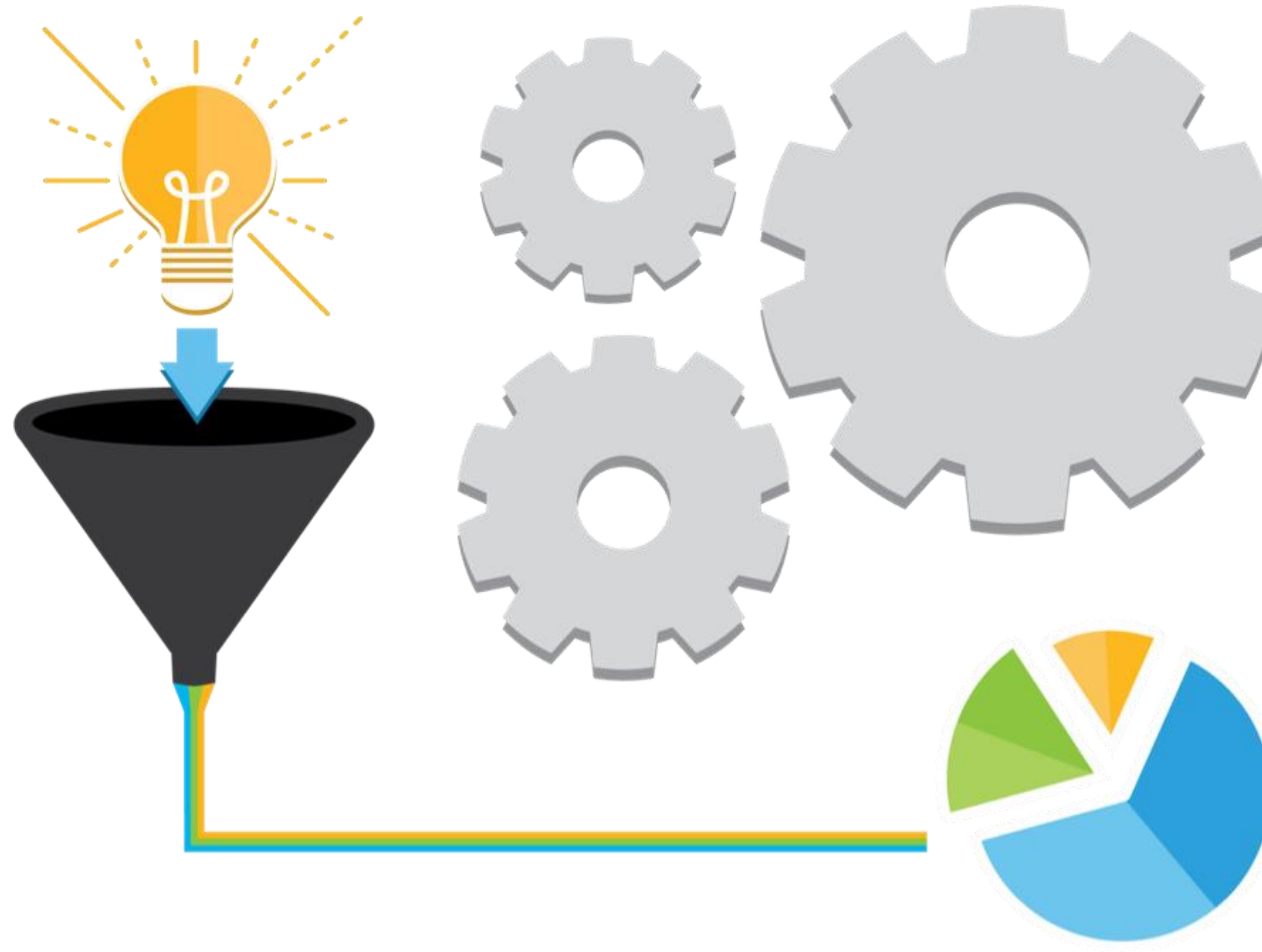Adaleta Avdic, Senior Account Manager

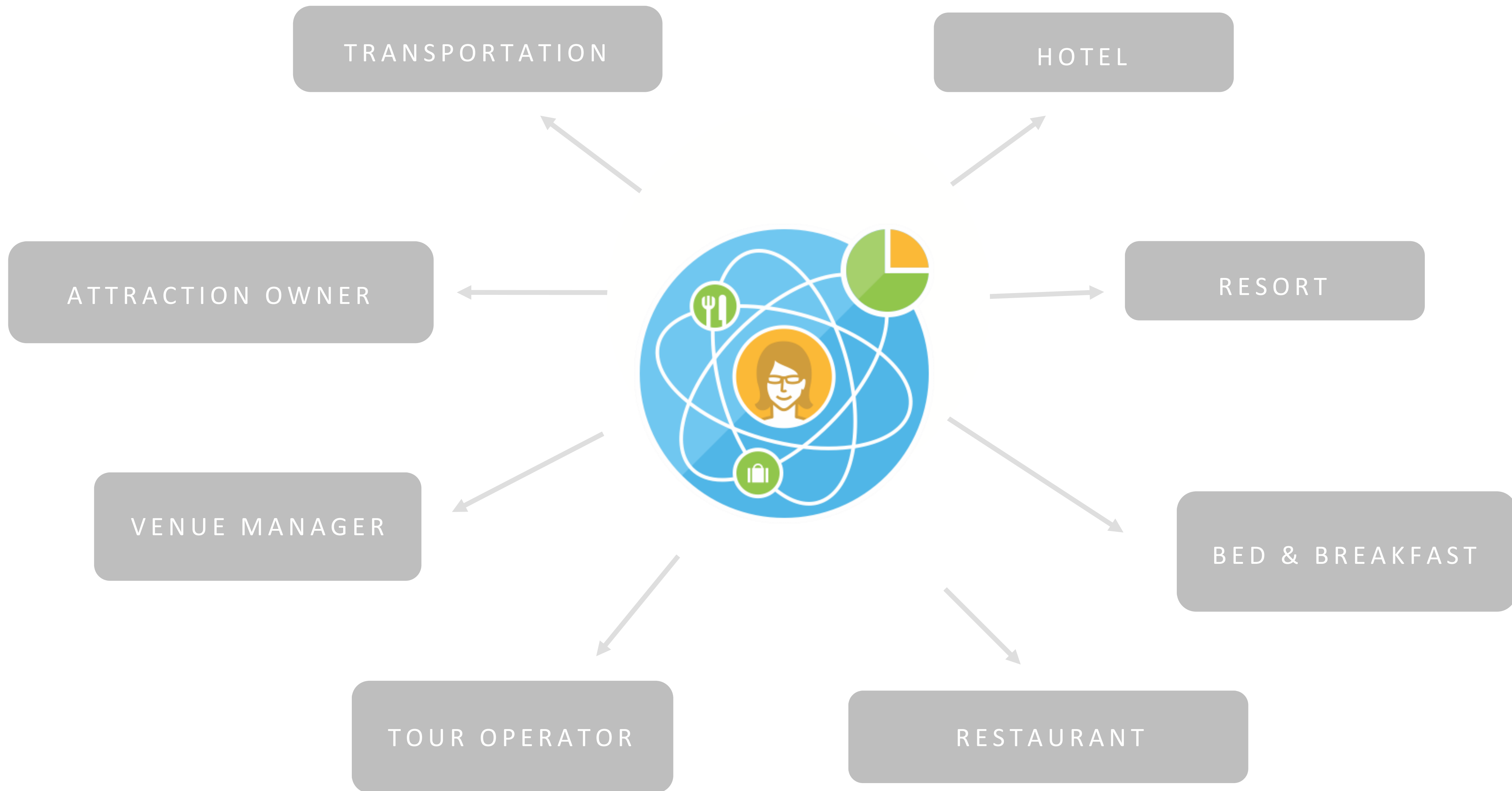# Customer Relationship Management

Data Management

EVERY **CUSTOMER** COUNTS

200+ Employees

Seattle, WA

Milwaukee, WI

Canton, OH

Pittsburgh, PA

Denver, CO

Flagstaff, AZ

Phoenix, AZ

Fayetteville, NC

San Diego, CA

Tucson, AZ

Wilmington, NC

Dallas, TX

EUROPE

Oslo, Norway

MAIN OFFICES

Remote Offices

538 clients

371 CRM clients

7,842 CRM users

30k/mo Extranet Logins

205 CMS 3.0 clients

76% of Top 50 U.S. Convention Cities*
Use Simpleview CRM
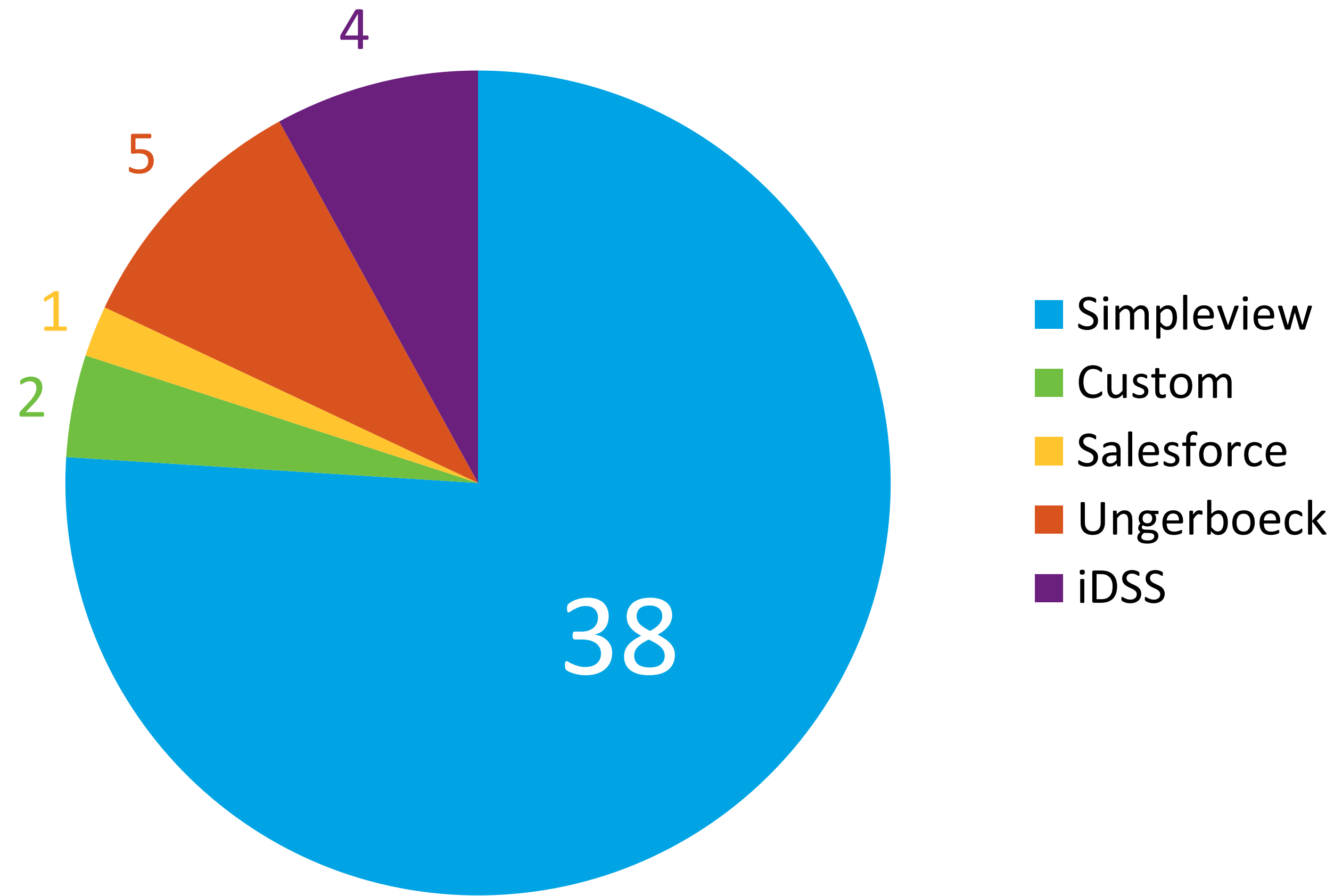
- Simpleview
- Custom
- Salesforce
- Ungerboeck
- iDSS

HOME

PROFILE

COLLATERAL

ADMINISTRATION

CLICK HERE TO CONTACT US FOR HELP

Extranet Training

Learn about listings, events, coupons, and more!

Industry Training Center

At A Glance

See All

296
Listing Views

302
Listing Click Throughs

0
Offer Views

There's no place like
Kansas

REGIONS & CITIES   THINGS TO DO   RESTAURANTS   PLACES TO STAY   EVENTS   TRAVEL TOOLS

There's no place like

Kansas

explore LAWRENCE

Kansas City Kansas
Convention & Visitors Bureau, Inc.

VISIT WICHITA

Visit Manhattan Kansas

VISIT Overland Park

Visit Topeka

244 (out of 400) live in Extranet 4.0

1.5 million logins

an average of
1,500 partners
log in every day
(that's 30k/month!)

They view an average of
7 pages and spend an average of **8 minutes**

350,000 leads responded to...

40,000 Listings Updated

25,000 events submitted/updated

TIP: Avoid having to re-enter your information.

Enter BUSINESS LISTINGS under listings.

Make sure you enter EVENTS in the Calendar of Events.

Kansas Office of Tourism & Travel Extranet

HOME
PROFILE
COLLATERAL

Collateral
Manage your Collateral

≡ Listings ◄——————— Enter LISTING information here!

⚑ Special Offers

✎ Calendar of Events ◄——————— Enter EVENT information here!

📷 Media

MARKETPLACE

Promotions

Online Payments

Partnership/Membership Signup

Partner Engagement
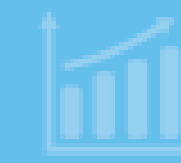
Advertising
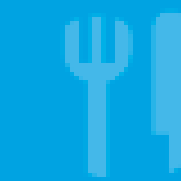
Basic CRM Features

› Cloud Service

› Customer-centric View

› Track won/lost business opportunities

› Manage inquiries, quotes, and orders

› Configurable/customizable features based on business needs

› Tracks the information that assists in building relationships with potential clients/partners

A CRM system is
not just a database.

It's a technology-enabled
business strategy.

CRM Strategy

› End Goals/Direction

› Leadership/Top-down Buy-in
and Reinforcement of Direction/Goals

› A CRM Evangelist and Data Owner

› Defined Data Management Procedures

› Change Management (People Management)

› Risk Mitigation

CRM Dimensions

> Information

> Communication

> Transaction

> Relationship

> Analysis
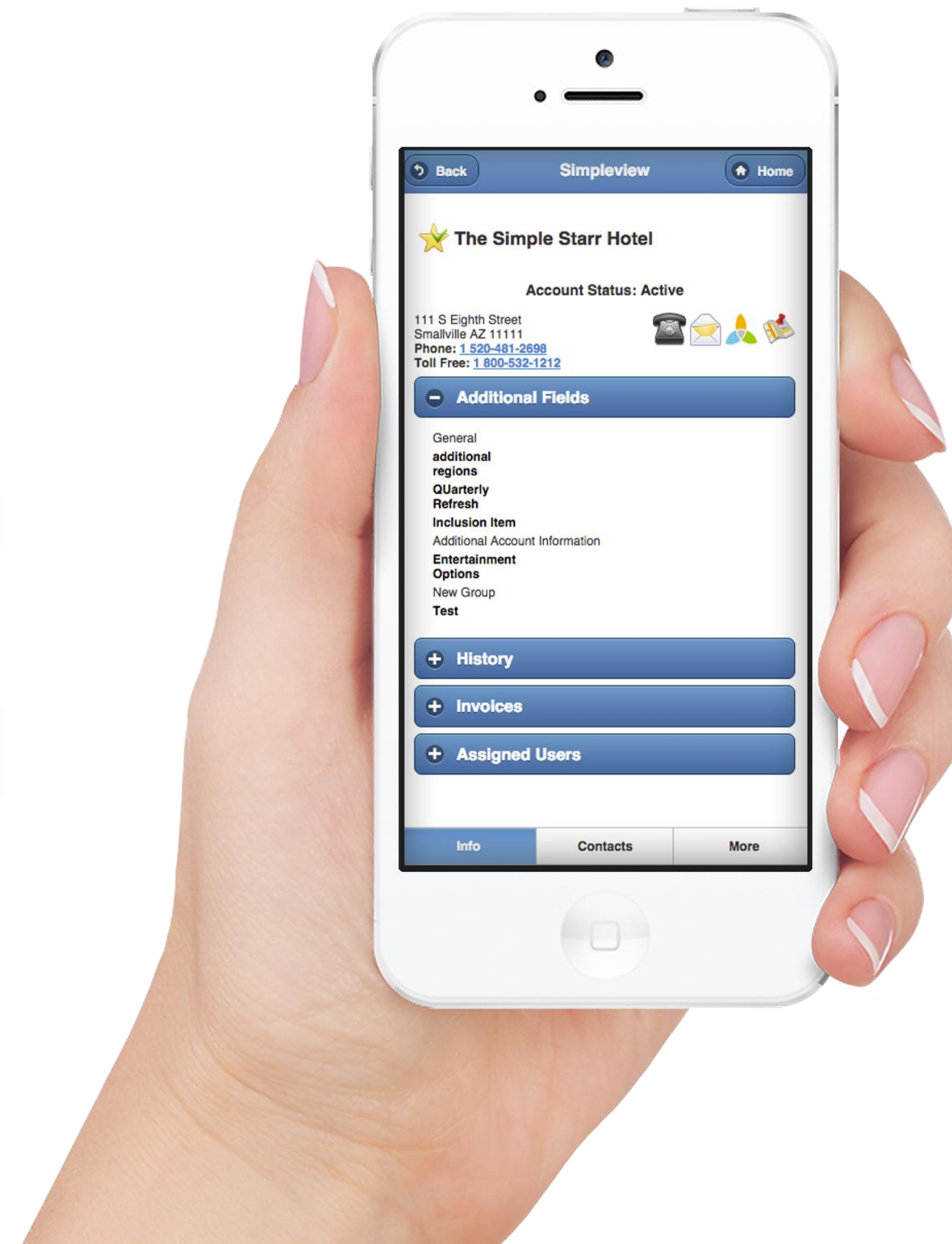
What are your goals?

Who owns it?

Buy-in Starts at the Top

LEADERSHIP MUST

› Reinforce goals, direction, and importance of CRM/Data Management

› Make it important part of the organization's culture

"The most successful CRM systems are at companies where the system is the culture."

— *Forbes Magazine, 2012*

We are the Champions

› **A Data Owner**

  › A fierce defender of the data accuracy and enforcer of the data management strategy

  › Might have one for each department

› **A CRM Evangelist**

  › Someone who preaches of the importance of the system

  › A super user who can help/train other users

Defining a Data Management Strategy

A CRM System Should Be...

› Part of your business strategy

  › Influence strategic, tactical, and operational decisions

› An important part of your culture

› Exalted

  › Properly maintained and curated

› Analyzed

  › Analysis and reporting

› Accessible

A CRM Should Not Be...

› Contorted to fit old processes/habits

› An unjustified burden on staff

› Ignored or mismanaged

› Launched without training and defined processes

› A requirement for staff without explanation of benefits

Training! Training! Training!

› Always training!

› Superusers should be available for all internal questions

› Vendor might be able to assist if difficulties arise

simpleview

Is the data useful?

- At the same time, don't over-require data input from staff.
- Useless data is essentially bad data
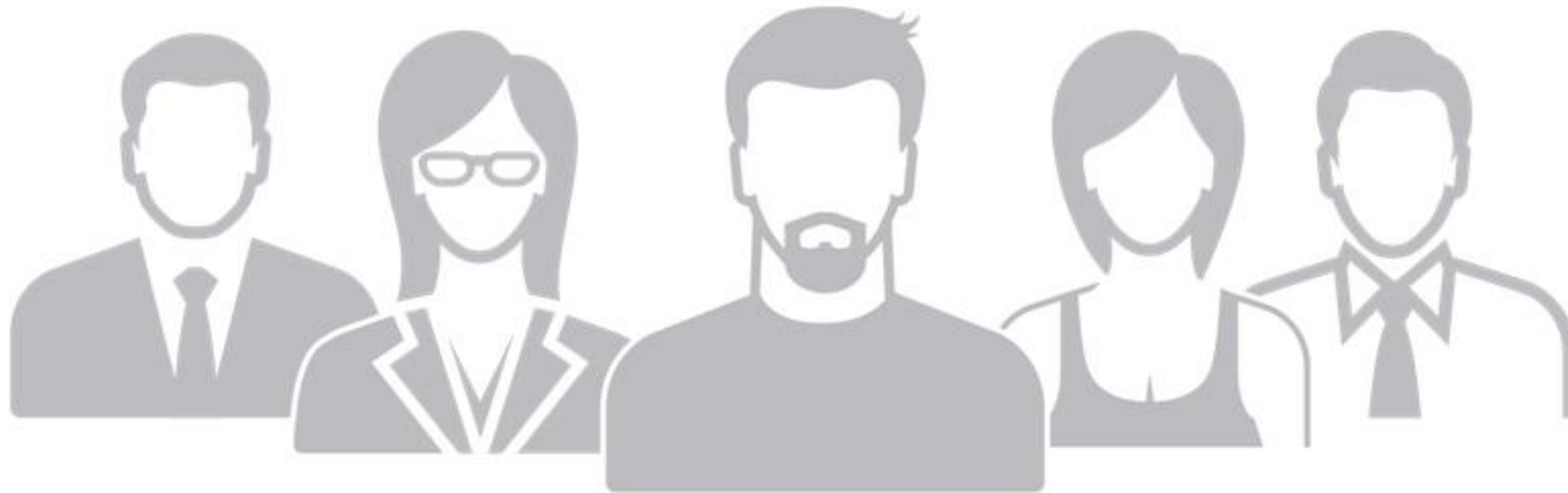
simpleview

Change is hard

Common Frustrations

I can't access it from anywhere

It's just a database, not a sales tool

This isn't how I used to do it

Too many fields

Not easy to use

DATA MANAGEMENT STRATEGY

A CRM Helps You...

› Coordinate delivery of services or products

› Provide better marketing and sales intelligence

› Promote standard and repeatable processes and procedures

› Track productivity and performance

› Maximize profitability

› Manage multiple aspects of the destination, including community and partnership management

Managing the Risks

Risk Management

› Know the risks

  › Slow end-user adoption

  › Customization risks

  › Upgrades and product changes

  › Organizational changes

› Have an action plan

  › Ongoing training

  › Review workflows and new processes

  › Superuser and evangelist to communicate changes

In Summary

› Step 1 - Focus on the output needs

› Step 2 - Make someone own it

› Step 3 - Create accountability and follow-through on it

Thank you!