

CRM Assessment, Redesign and Implementation

Business Issue

The client, a \$250M software provider to the automotive and lumber industries, recognized the need to improve their service levels while reducing the cost of customer service delivery. Additionally, the client desired to integrate and implement all recommended customer service and call center improvements across two diverse business segments, field services and four additional customer points of contact. All design work was being done in preparation for an Oracle CRM implementation.

Solution

The company initially sought assistance in assessing their current customer service and call center processes and technology across the organization. Additionally, they wanted a future state-operating model for one of their divisions. Once the future state had been defined, the customer required assistance in implementing process changes and integrating those changes across additional business segments and customer contact points. At this point the company was ready to implement Oracle CRM. Our firm assisted the team through functional implementation and report implementation (Discover). With a scalable application environment, the company finalized 5 acquisitions, for which we assisted the client in the conversion of these clients to Oracle. This also required minimal technical integration of point applications.

Client Value Delivered

The team delivered the following results to the client:

Phase I

- Reviewed all customer service processes and functions, including call processing, knowledge management, capacity management, call escalation, service level agreements, customer segmentation, field service and dispatch, customer satisfaction, competitive and generic benchmarking and all supporting technology.
- Developed prioritized process improvement recommendations based on the review of the above functions, client interviews and customer surveys, and technology assessment.
- Ranked recommendations based on impact on the business area, cost and ease of implementation success.
- Prepared an integrated design model and implementation plan that covered strategy, process, technology, organization, performance measures, roles and responsibilities, rewards and recognition, and management reporting.
- Provided an analysis of the costs and benefits associated with the expected end state.

Phase II

- Developed, tested and implemented a new problem coding structure for all products supported, including defining the levels of coding, the compliance process, tools and mechanisms.
- Defined, populated, tested and implemented a diagnostic process that facilitated the creation of diagnostics to produce the most frequently needed diagnostics. This included standards and structure definition, and development of diagnostic process and scripts.
- Created, tested and implemented an interim Knowledge Management (KM) process that captured known solutions to known problems, based on actions taken on problems presented to call center agents. The testing process confirmed usability and retrieval and was designed with the expectation that content would be readily converted to the selected CRM, thereby minimizing data conversion on the CRM implementation.
- Developed and implemented a balanced scorecard for Call Center agents and Field Service engineers, including specific performance measures, sources of performance data, tools and mechanisms and reporting structure.
- Defined, developed, tested and implemented a set of reports provided to Agents, Managers and Executives that provided point, time and trending on metrics defined through the balanced scorecard initiative.
- Performed a fit analysis for an additional business unit against the new operating model, including design gaps, process changes required, and implication on overall design effort.
- Performed a customer service assessment and developed future state model for field service segment and

boundary groups, including review of processes, identification of major gaps, definition of major scenarios, fit analysis against standard CRM functionality and integration to call center future state design.

Phase III

- Built the specifications for the required changes to the legacy technical environment.
- Provided detailed project management through the technical build and test phases.
- Served as project manager for the implementation of the new legacy solutions, including training and go live.

Phase IV

- Provided input to Future State design details – as created in prior C Care project phases.
- Assisted Prime Contractor in defining decision options as they arose in configuration decisions.
- Updated Future State business processes resulting from CRP sessions and configuration decision points.
- Defined and executed the Communication Plan and the Leadership Assessment Action Plan.
- Assessed and provided action plan for end user risk.
- Coached management on actions to reduce end user risk.
- Provided quality assurance on training risk elements.
- Designed and built Custom Reports using Oracle Discover.
- Created a mid tier set of tables to house the calculated data elements required for the reports.

Phase V

- Defined detailed project plan to integrate 5 acquired companies for all order to cash functions.
- Managed activities to successfully integrate the companies.
- Built technical integration between point applications and Oracle that were required during transition of acquired businesses and final roll out of specific Oracle modules.