

Framework for:

# CRM strategy

Date: \_\_\_\_\_

Company: \_\_\_\_\_

Participants: \_\_\_\_\_

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# The art of being different when everything else is the same

CRM, or “Customer Relationship Management” is a buzzword in today’s marketing. But like most trends, the purpose of relationship marketing is fairly obvious – to know your customers well and to have a customer focus. CRM can be defined as the art of establishing, maintaining and developing profitable customer relationships in order to get more loyal customers and ultimately increase competitiveness.

This is not new information. On the contrary, businessmen have always known the value of having satisfied clients who want to come back and buy more. All marketers also know that it is nearly five times more expensive to acquire a new customer as to retain an old one and that satisfied customers are the best sales people - they become ambassadors for the company. However, a number of changed conditions have given new impetus to CRM.

One of these is the fact that the products have become increasingly similar in terms of price, functionality and quality. With an abundance of equivalent products the client is more or less forgotten. Therefore all companies must shift from traditional product orientation to customer orientation.

If they do not understand what binds customers to them there is an imminent risk that the customers turn to competitors instead. Ultimately it is about the art of being different when everything else is equal.

The new information technology has also created new meeting points between companies and customers. The need to meet physically has been reduced. If the customer, for example, only has time to conduct his or her banking business at night it is not a problem. Businesses have the opportunity to communicate with customers in interactive and multi-individual ways. Meanwhile, the amount of information has grown and is distributed in more places than before, which has increased the need for synergy between different functions within companies.

One cannot emphasize enough that in CRM, as in any other business, it is important to do things in the right order. CRM is not a technology issue, instead it begins with everyone in the company changing their approach and becoming more customer oriented.

## Framework for ...

Pyramid has extensive experience in B2B branding, and we would like to share it with you.

This document summarizes the issues worthy of consideration in the development of a branding strategy. Don’t expect any fixed or general solutions. Successful solutions are the result of a concerted effort, based on the right assumptions and facts.

We use a customized version of this structure when we go through projects so feel free to use the material as a checklist or as a basis for discussion.

If this seems interesting and you want to discuss marketing strategy on a deeper level, you are always welcome to contact us at [info@pyramid.se](mailto:info@pyramid.se)

Vision and business idea →

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Business and marketing strategy →

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Customer focus →

What structured customer development activities do we have today?

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What investments have we made in customer support systems?

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Situation analysis →

	Yes	No
Do we lead the market?	<input type="checkbox"/>	<input type="checkbox"/>
Have we identified all our customers/end customers?	<input type="checkbox"/>	<input type="checkbox"/>
Do we know what and how much our customers buy?	<input type="checkbox"/>	<input type="checkbox"/>
Do we know our customers' life-time value?	<input type="checkbox"/>	<input type="checkbox"/>
Have we identified all our contact points with our customers?	<input type="checkbox"/>	<input type="checkbox"/>
Do we have accurate, detailed, current information about all our customer contacts?	<input type="checkbox"/>	<input type="checkbox"/>
Can we collect customer data from all our customer contacts?	<input type="checkbox"/>	<input type="checkbox"/>
Is all customer data gathered in one place?	<input type="checkbox"/>	<input type="checkbox"/>
Can we distribute the same customer data to everyone in our organization?	<input type="checkbox"/>	<input type="checkbox"/>
Do we have a Call/Contact Center?	<input type="checkbox"/>	<input type="checkbox"/>
Can we handle customers in a consistent and personalized manner through all contact channels?	<input type="checkbox"/>	<input type="checkbox"/>
Do we follow-up and confirm customer satisfaction?	<input type="checkbox"/>	<input type="checkbox"/>
Can we give service and support 24/7?	<input type="checkbox"/>	<input type="checkbox"/>
Can we make individualized offers?	<input type="checkbox"/>	<input type="checkbox"/>
Do we have any customer club, VIP, bonus system, etc?	<input type="checkbox"/>	<input type="checkbox"/>
Do we do regular market studies?	<input type="checkbox"/>	<input type="checkbox"/>

Customer analysis →

Volume

Number of active customers: \_\_\_\_\_ Total number of customers: \_\_\_\_\_  
 Number of passive customers: \_\_\_\_\_ (invoiced during the past 12 months)  
 Number of potential customers: \_\_\_\_\_

Customer analysis →

Ideal customer

What characterizes the ideal customer?

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Based on total active and passive customers, analyze:

Profitability

Percentage profitable customers with growth potential: \_\_\_\_\_ %

Percentage profitable customers: \_\_\_\_\_ %

Percentage unprofitable customers with potential to be profitable: \_\_\_\_\_ %

Percentage unprofitable customers: \_\_\_\_\_ %

Repeat-sale frequency

What percentage of customers have bought once? \_\_\_\_\_ %

What percentage of customers have bought 2-5 times? \_\_\_\_\_ %

What percentage of customers have bought 6-10 times? \_\_\_\_\_ %

What percentage of customers have bought more than 11 times? \_\_\_\_\_ %

Customer share

What portion of customers represents more than 50 % customer share? \_\_\_\_\_ %

What portion of customers represents less than 50 % customer share? \_\_\_\_\_ %

What is the distribution amongst the 10 largest customers? \_\_\_\_\_ %

Proportion of loyal customers

What percentage of customers are loyal? \_\_\_\_\_ %

*(Loyal means customers who are likely to recommend us to other customers, who have high repeat-order frequency, or to whom we deliver a large percentage of the customer's purchase potential.)*

Collateral sales

What share of customers buy more than one product or service? \_\_\_\_\_ %

Customer responsibility

Who is responsible for customers? \_\_\_\_\_ %

Which departments have customer contacts/meetings? \_\_\_\_\_ %

Support/service

What portion of customers have a service/support contract? \_\_\_\_\_ %

Do we offer different types of contract? \_\_\_\_\_ %

Customer data

What customer information do we have? \_\_\_\_\_ %

Where is it? \_\_\_\_\_ %

Who has access to the information? \_\_\_\_\_ %

How is the information used? \_\_\_\_\_ %

Customer analysis →

How are claims handled?

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**Segmentation**

How are customers segmented?

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**Customer strategies**

Are there one or several customer strategies? What are they?

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**Customer needs**

How are customer needs systematically recognized and served?

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**Customer satisfaction**

How do we measure customer satisfaction?

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**Customer's value process**

What creates value for the customer?

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**Business-critical customer meetings**

Which are they?

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**Value offer**

Who is responsible for the company's value offer to the market?  
How is the offer developed and formalized?

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## Value chain →

Describe the value chain from producer to consumer?

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## Advertising and marketing channels →

	Integrated IT support	Stand-alone IT support	No IT support
<input type="checkbox"/> Club activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Customer website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> E-direct marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Direct marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Loyalty program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Customer newsletter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Public website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Bonus program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Sales channels →

	Integrated IT support	Stand-alone IT support	No IT support
<input type="checkbox"/> Customer support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Sales force	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Sales and distribution subsidiaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Telemarketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> E-business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Catalog sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Trade fairs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Direct Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Contact Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Service channels →

	Integrated IT support	Stand-alone IT support	No IT support
<input type="checkbox"/> Field service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Assembly and installation team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Telephone switchboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Service web	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Call/Contact Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Communication channels →

<input type="checkbox"/> Telephone/personnel	<input type="checkbox"/> Voice via IP	<input type="checkbox"/> E-mail	<input type="checkbox"/> SMS
<input type="checkbox"/> Telephone/self-service	<input type="checkbox"/> Voice mail	<input type="checkbox"/> Chat	<input type="checkbox"/> Interactive TV
<input type="checkbox"/> Fax	<input type="checkbox"/> Letter	<input type="checkbox"/> Extranet	
<input type="checkbox"/> WAP	<input type="checkbox"/> Internet	<input type="checkbox"/> Co-browsing	

## IT support, Marketing →

	Integrated IT support	Stand-alone IT support	No IT support
<input type="checkbox"/> Customer analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Segmentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Campaign management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Direct marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Leads management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Marketing encyclopedia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Marketing management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## IT support, Sales →

	Integrated IT support	Stand-alone IT support	No IT support
<input type="checkbox"/> Team selling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Installed base management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Sales forecast management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Order management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Product configuration & pricing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Proposal management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Opportunity management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## IT support, Service and support →

	Integrated IT support	Stand-alone IT support	No IT support
<input type="checkbox"/> Club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Knowledge management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Problem resolution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Field service management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Installed base management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Contact management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Case management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Call tracking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## IT support, Core →

	Integrated IT support	Stand-alone IT support	No IT support
<input type="checkbox"/> Account management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Contact management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Escalation management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Literature fulfillment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Activity management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Calendar management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Business Intelligence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Channel management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Content management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*Pyramid builds brands and creates remarkably profitable, cross-border communication for international companies with high ambitions and entrepreneurial spirit.*

*What should one do to stick out, to break through, and to do so with credibility intact? We have proven methodologies that lead to the answer.*

**Together we can:**

- create cross-border communication beyond the expected
- attract a global market across national borders
- take advantage of all media, digital and analog, with an open mind
- bridge cultural barriers and reach professionals
- cross-fertilize knowledge and experience from different areas of industry
- integrate our skills across disciplines and coordinate the communication

**In Pyramid, you have a partner who:**

- spars with you on a business strategy level
- focuses on your organization
- market-adapts your offers
- positions your company
- differentiates your products and services
- builds strong brands
- stimulates your sales team
- attracts the right target groups
- gets your business to grow globally
- optimizes what you get from the Internet  
i.e. boosts your growth and profitability.

