



Making CRM: An Operational Reality

Glen S. Petersen

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Successful deployment of CRM can only be achieved by making it operational within the organization. The challenge is that for functionally structured companies, CRM is an alien concept that typically runs counter to current processes and policies. To effectively navigate through this transition requires a vision, a plan, and senior management leadership. Based on this definition, it should be easy to understand the current confusion in the CRM industry. Senior management views CRM as a technology as opposed to a business strategy; given this assumption, the initiative attempts to deploy costly capabilities that are of marginal value to the organization. Even when senior management recognizes CRM as a strategy, they may still have problems visualizing how to make the transformation operational.

This book represents a first step to articulating a framework for understanding CRM as an operational strategy and making the transformation to being customer centric. This methodology is based on challenging the organization to define the true drivers of the business and then providing a parallel definition using CRM. This concept should assist senior management to create a vision for CRM and create a transformation plan that moves the organization toward achieving the tangible benefits associated with CRM.

To accomplish this task, the book guides the reader to better understand the sources of confusion regarding CRM and how organizations lose their way in the process. The book also links the challenges facing senior management with the specific capabilities of CRM so that it is crystal clear why the organization needs to take this journey. The book offers a specific set of steps that makes CRM real to senior management and to the rest of the organization. It then provides a number organizational perspectives that define how to make CRM operational and garner the benefits of being customer centric.

This is a must read for project teams, management, and vendors. For the first time, there is a bridge from CRM at the concept level to CRM at the operational level. This content should provide the framework for any organization that wants to successfully make this transformation. Mr. Petersen has been in the industry since its inception and has experience as both an end user and as a consultant. His advice is pragmatic and is designed to help organizations to define their own road to success.

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