

The Missing Link in CRM

Adding BPM to CRM improves the customer experience

If you're an executive involved in sales, marketing, or customer service, you know the benefits of CRM software. Less well known, however, is the power of business process management (BPM) to improve your CRM strategy and implementation. According to a recent study, 31 percent of companies blamed CRM shortfalls on poor business process design, and 21 percent struggled with customizing CRM to their unique organizational requirements.

Such challenges arise because CRM success requires a change in business processes toward a customer-centric approach. When CRM software makes it difficult to customize and automate customer-facing processes, sales, marketing, and service cycles can suffer. Cumbersome, manual CRM processes can lead users to neglect key steps, resulting in fewer sales and decreased customer loyalty. Innovation, too, will be stifled without tools for process analysis and feedback loops for continual improvement.

That's why it pays to utilize CRM software that includes BPM as its core functionality. Although BPM isn't new, its potential for transforming CRM processes is just now being realized. With a process-based CRM solution, organizations can design and execute automated processes that are best suited for their business. Whether it's customer data management, campaign management, or time management, organizations can create new and innovative processes to improve sales and optimize the customer experience. Plus, any of the newly created processes can be analyzed for their effectiveness.

As an example, one systems integrator doubled its upselling capability simply by

focusing process improvements in this area. Another, an issuer of micro-credits with 55,000 customers and multiple branch offices, streamlined and automated its processes with BPMonline. As a result, the time needed to issue a credit dropped to 15 minutes.

CRM with BPM functionality can also help to replicate success throughout your organization. You might have heard the expression "top salespeople are born, not made." However, if you evaluate why some consistently hit their targets while others struggle, you will see a pattern of processes that make this happen. BPM combined with CRM is about identifying such processes, replicating them, and applying them universally across teams and departments.

As you start to manage CRM processes more closely, you will find that improvement becomes easier. The steps to acquire and retain customers can be automated and continually refined. Automating routine operations enables you to focus only on those activities that are vital to building long-term relationships with customers. You will also find that crisper processes will lead to better communications, as well as time and money saved when performing routine tasks. In addition, staff training will be simplified when roles and processes are better defined.

To achieve such advantages, you need to choose the right software package, one with easy-to-use CRM integrated with BPM tools for process design, automation, and analysis. Consider ease of process design and customization, as well as support for standards such as business

process modeling notation. Look for software that includes best practices and processes for your industry; it's far easier than building them from scratch. Avoid vendor lock-in by choosing an open-source solution. Evaluate ease of integration with your legacy systems. Also, consider the flexibility of deployment options—on-premises as well as software as a service (SaaS). With a monthly subscription that includes upgrade and support costs, SaaS can get you started quickly while avoiding capital expenses.

With the right solution, you can take control of your business processes and become more customer-centric and ready to respond to changing needs. "By merging CRM with BPM, you gain the ability to continually test, modify, and improve your processes," says Katerina Kostereva, CEO and co-founder of BPMonline. "This capability to evolve and innovate is the key to exceeding customer expectations."

ABOUT BPMONLINE:

BPMonline is a global company that offers world-class solutions for business automation. The heart of BPMonline CRM is a BPM engine that couples powerful tools for process design with automation and analysis. Last year, BPMonline CRM was named winner of the CRM Idol 2011 contest for the EMEA region. The contest judges called BPMonline one of the most elegant process-based CRM applications, providing user-friendly customization at an inexpensive price point.

To try BPMonline at no charge, or for more information, visit www.bpmonline.com.