

Digital Transformation & CRM An Executive Guide





Digital Transformation Strategy

A Digital Transformation Strategy is a plan of action describing how an organisation must strategically reposition itself in the digital economy. As customer habits change so organisations need to adapt and evolve to remain successful. They need to innovate, change operating and business models and leverage emerging technology.

Introduction

Technology has become the great leveller in the last decade, putting much more control in the hands of consumers and business buyers alike. Thanks to digital disruptors such as Zoom, Amazon, Airbnb, Netflix and Uber, buyers expect organisations to know their preferences and needs, regardless of whether your organisation is selling technology, equipment or services. Seamless transactions across multiple devices and 24/7 access are the new norms across industries.

Setting your brand apart from your competition begins with providing a customer experience that is consistently better and more memorable at every touchpoint that your prospect or customer has with your brand. This is achieved through a deep understanding of their needs as they research, evaluate, buy, and use your product or service.

Customer Relationship Management (CRM) has emerged as the solution for this customer-first transformation. When it comes to traditional CRM systems, even those who have benefitted most often haven't used it to its full potential with traditional CRMs being complicated and time-consuming to use. But the modern CRM solution has come a long way from its more modest beginnings.

In this whitepaper we'll explore why a CRM solution should be a pivotal part of your digital transformation journey and what CEOs and their leadership team should be considering throughout the planning, vendor selection, design and implementation of a CRM solution.



Many different paths lead to a digital transformation and each organisation's journey will be unique to them. For example, an organisation might introduce artificial intelligence or cloud computing to enhance its customer experience. It might redesign its supply chain to make better use of machine learning. An organisation can even make smart predictions about the products customers will want in a few months' time, then shift production to meet demand.

In every case, though, starting a digital transformation journey requires a new mindset. It is a chance to reimagine how an organisation does things, often from the ground up.

A digital transformation strategy is a high-level plan outlining your organisation's objectives and digital initiatives.

When developing this strategy, it's important to keep following elements in mind.

1. Business Assessment

Your digital transformation strategy should begin with a detailed assessment of your current organisation. This initial assessment should include your strategic goals, key performance indicators and potential growth opportunities.

2. Marketplace Insight

After your initial assessment, it is important to understand how you compare to your direct competitors as well as your industry. Are your competitors in the midst of their own digital transformation? What digital solutions are they working on? What new technologies or tools are being implemented within your industry? A competitive analysis will help you understand the market and identify opportunities to build a thriving organisation.

3. Prioritise Digital Initiatives

Each digital initiative will be different in scope, resources and return on investment. Prioritise

your initiatives based on their value, impact and estimated efforts. Start with simple projects with essential features to test your digital solutions viability.

4. Create an Implementation Plan

The implementation plan should include a road map for each initial digital initiative, resource requirements and criteria for measuring results before beginning the development stage. Identify all development and delivery processes to build standard practice for your entire organisation.

5. Build a Budget and Business Case

Most digital transformation efforts fail because of insufficient budget. When you create your budgets, anticipate delays and plan for when the new technology makes current investments obsolete.

6. Build a Strong Project Team

Technology is not your only cost. It is crucial to assemble a winning team with the right skills and mindset to put your strategy into action. Conduct an assessment of your current capabilities and who you need to achieve your digital initiatives.



CRM as a Foundation of Digital Transformation

As customer centricity takes centre stage, organisations are constantly trying to realign their business and technology practices to enhance customer and employee experience. Organisations want to understand every aspect of a customer's lifecycle and they are facilitating the same though evolving their CRM thinking as a foundation to their digital transformation strategy.

There is no longer a 'one size fits all' approach when it comes to CRM. Customer journeys vary not just from industry to industry but also organisation to organisation. Rigid CRM's are becoming less popular as organisations are working towards customising CRMs based on the touch points they need to address and collect valuable data. CRMs today are capable of gathering real-time data on



Customer behaviour and converting insights into intelligible information.

CRM becomes the foundation that fully integrates with four other key digital transformation building blocks.

- Data and analytics: CRM contains and/or integrates with your robust data and analytics tools to provide deep customer insight so you can personalise your communications and services.
- Social media: CRM can work hand in glove with your private and public social media communities to ensure you regularly receive social insight from your digital customers.
- Customer engagement: CRM contains the customer journey mapping tools and digital survey tools or integrates with third-party tools so you can engage better with your digital customers.
- Emerging technologies: CRM puts into place digital triggers and other emerging technologies, like artificial intelligence, that drive next steps/next actions to not only keep your digital customers satisfied and loyal but also turn them into digital advocates.

While competing in the new arena of customer experience, organisations need to develop their processes starting with ideal customer journey and link them to their operations to deliver superior value. Today's customers expect integrated processes across products and multiple communication channels. Misalignment of products, services, policies and processes with customer priorities cause a negative customer experience in many situations. Developing processes, starting with the customer interactions, will help to avoid this. This will not only benefit the customer, but will also help to identify and fix inefficiencies, directly affecting the bottom line.

Journey-based process design

Service experience blueprints clarify roles & responsibilities at every touch point and can be used as a starting point for a customer-centric process landscape. By designing processes from a customer point of view, organisations can streamline processes and eliminate the waste that is currently impeding efficiency. One important factor to consider here is that companies often have inefficiencies in their operating model that need to be solved first before you can bring the new customer-centric process landscape to life.





Process automation

Today's technology enables companies to facilitate or even automate a significant amount of their processes. Adapting process automation for CRM purposes is beneficial from two perspectives, as it decreases process cost (manual handling) while improving process performance (cycle time, faster process output). Although primarily adapted for trivial, highly repetitive tasks, some companies have already started to automate more sophisticated processes using the current opportunities of AI in a mix with defined business rules. Common applications are "next best offer" processes or excluding currently unsatisfied customers from cross-selling and up-selling initiatives.

When it is time to implement a new CRM, organising your team with the right people is critical. When a CRM is going to be at the core of your operations, the input of employees who know the organisation's processes needs to be considered as you get ready to select and deploy the best available solution. Executives can be unfamiliar with process specifics that can be different from organisation to

organisation. Lacking this qualified guidance from a true executive sponsor may result in a CRM system that does not work the way your organisation does. Users will have to compromise each time they interact with it unless you take corrective actions, which could result in rework or major configuration changes. The more actively key people from the business groups are engaged, the easier it will be to ensure user adoption of the new CRM system.

You also need committed executive sponsorship throughout the duration of your CRM project. The executive sponsor can make or break the success of the CRM deployment. This role is more than a contract-signing figurehead who writes an email to the organisation about what to expect or with praise for the team that got the work done.

The sponsoring executive needs to be an ambassador for the project, evangelise it in the context of the organisation's strategy and goals, and communicate its milestones, expected changes, and desired outcomes to the organisation. The executive sponsor takes responsibility for their team's



contributions to keeping the project on track, negotiates adjustments in schedules, budgets, or functionality, and readies people for the changes and improvements they can look forward to with their new CRM solution.

A study in 2019 by Villanova delved into the importance of executive sponsors for project management in general. The study says that “successful executive sponsors have detailed knowledge of a project and understand how it aligns to the overall strategy of the business.” With that knowledge and their positions in the organisation, they are expected to use their authority to move the project along, whether it’s to remove obstacles or make effective decisions.

Villanova found that there are three areas that executive sponsors have the greatest impact upon project outcomes:

Visibility — Productive executive sponsors remain involved throughout a project’s lifecycle and take ownership of the project’s outcomes. They are responsible for providing necessary resources, offering input to ensure the project stays aligned with overall strategy and keeping other executives informed on the project’s progress.

Communication — Employees impacted by change want organisational leaders to be transparent. Frequent and concise communication is an important duty for an executive sponsor to clearly communicate why project changes are important and risks that come with not implementing them.

Coalition building — Executive sponsors are expected to take the lead in building and maintaining a group of leaders who support change and are willing to legitimise it in other parts of the organization.

Executive sponsors are just one way to ensure CRM implementation success, but they are a hefty part of the overall process. Make sure your CRM project is set up for success at the beginning, so your project doesn’t become another failed CRM implementation horror story.



Vendor Selection

Like in any industry, there are some big names dominating the CRM market, but don’t be swayed solely by numbers. A huge customer base might well seem like a ringing endorsement, but no CRM is one-size-fits-all. If your organisation has particular needs, let those needs inform your search.

Take a look at their features, and see how many you can tick off against your needs and wants lists. If they can take care of all your base requirements, and have at least a few capabilities that could help with some of your future goals, add them to a shortlist.

CRMs constantly evolve and vendors add new features all the time, so if you think a vendor is in the ballpark of being able to provide the functionality you’re looking for, it’s worth finding out more, as they may be planning to add new components in the near future.

Review the available CRM vendors

Most good CRM vendors will be able to take your brief and tell you if and how their product fits the bill.

Remember, there’s more to a CRM than a huge array of features, and if you’re going to find the right fit for your organisation, you’ll need to factor in the less interesting stuff too. Licensing, security, set up; it all needs going over with a fine-toothed comb before you take the plunge.

Here are some key areas of consideration when reviewing potential CRM vendors:

Experience - Does the vendor have a background in dealing with your industry and business type? Is their CRM proven to work with a similar business model to yours?



Cost - How much does the product cost? How does the vendor bill customers? Does it offer different licensing levels?

Updates - How often is the product updated? Are there any new features planned for the future?

Support - Does the vendor offer a good level of support to help deal with any issues?

Compliance - Does the way the software uses and stores your data comply with data regulation where you are?

Integration - Does this software support any software you already have and need to keep using?

Implementation - How long does the product take to roll out? What's the process for importing legacy data? Will you need to outsource your implementation?

Some vendors will offer free trials or guided demos of their products, so make the most of these. Get everyone who'll be using the new CRM involved so they can get a feel for the features and interface. Be sure to note down any feedback they give you; you need a solution that works for everyone, or it won't work at all.

Most CRMs are scalable, so you want your vendor to be able to help you fortify and expand your CRM when the time is right. You should approach your relationship with your CRM vendor as a long-term commitment; yes, if you're not happy you can always switch to another product, but hauling your data over to and learning how to use a new solution all over again is a major annoyance.

Final Thoughts

The term digital transformation describes the actions taken by an organisation to change or adapt its current business model to a new market reality, which helps drive change not only improving the customer experience but also the employee experience.

Regardless of channel, customers want seamless digital experiences. A good CRM solution lets you tie all the digital channels in your organisation together in one place, to provide a user-friendly experience for prospects, customers and employees alike.

A good CRM solution must possess an easy-to-understand and engaging user interface. This engagement can also be increased by the use of embedded collaboration tools as well as integration with other key systems such as email, calendaring and access to back-office information. The most important feature that a CRM should possess is the ability to provide contextual intelligence gathered from both internal and external resources. This too, from a single user interface.

If you're at the stage where you know that greater technology adoption would elevate your business and accelerate growth, you need to then think carefully about the part that people play in this change – your workforce transformation. Digitisation can involve a sizeable work culture shift. It is not just changing the way of working and digitising processes but encouraging your people to embrace this change instead of resisting it. You will need to work hard to get the buy-in.

The key to success in technology adoption is dependent on how well the new technology is introduced and 'sold' to the employees, so that they can see the value it brings, not just to the organisation but to their everyday lives. Show them how it can simplify things and make their lives easier. Show them how it can save time and help them be a more effective member of the team.

To find out how ViewPointCRM can help your organisation, [click here to arrange an initial meeting with our team.](#)



About StyleTech

We Are All About You

At StyleTech we are committed to building a deep understanding of your organisation, its strategic goals and challenges. Equipped with this knowledge we work with you to deliver a fit-for-purpose CRM solution that will help drive your organisation forward.

Why our clients choose us:

- **Trust**
We are trusted by leading private and public sector organisations across the UK.
- **Security**
We keep our clients' systems protected and secure at all times.
- **Award-winning**
We have won multiple awards by applying best practice to the areas of analysis, design and software development.
- **Specialists**
Our expert team of developers have decades of experience in developing software across current and legacy platforms, ensuring seamless integration of applications.



Joshua Chapman
Marketing Director
Scientific Laboratory Supplies

"We chose StyleTech because their system was unlike anything else we had seen. Not only did their functionality tick more boxes than many other systems with functionality like the Quotes Hub and Discovery, but their programme allowed for significant bespoke interfacing to other areas of our business that would have required cost-prohibitive development from other packages we were looking at. This would allow for a much more consolidated programme with opportunity for further development as we continue to develop and innovate our systems."



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