



IMPLEMENTING A WEB BASED CRM/SUPPORT SYSTEM

This whitepaper discusses the benefits and challenges of implementing a new Web based CRM/support system. It offers several practical suggestions for how to go about this task, as well as describing the rewards to be gained and the common barriers to implementation.

Why Online Web Based CRM ?

It is clear that the internet has become an essential sales and marketing tool for businesses of all kinds. The Web is also ideally suited to provide customers with instant and readily accessible customer information and support. While many businesses have been relatively quick to jump on the E-commerce bandwagon, they have often been slower to adopt Online Web Based CRM . This is ironic, since the profitability of E-commerce has been slow to prove itself, while the cost savings of offering Online Web Based CRM can be both immediate and dramatic. If you are not using your web site to offer your customers support, you might consider the following:

- **Online Web Based CRM is the other half of E-Commerce.** People who buy on the web 24/7 expect to be supported on the web 24/7. Customers now buy on their own schedule, and they expect to be able to get help at any time of day.
- **When you frustrate your customers' need for instant information, you risk losing them.** One of the major draws of the internet is its ability to offer immediate gratification of a customer's needs outside of traditional business hours. If a customer can't find answers when he needs them, he will look for a company whose web site offers the support he needs.
- **Providing answers over the web is extremely cost-effective.** The cost of answering customer questions over the Web is less than one tenth that of answering them over the telephone. And the majority of calls received by customer call centers typically involve questions that have been answered before and problems that have already been solved. By making these answers and solutions readily available over the Web, support staff can focus on new issues and revenue-producing activities, rather than repeatedly answering the same questions. This can reduce support costs by up to 70%.
- **You cannot sell to more customers than you can support.** Companies who fail to effectively implement the Web's potential for customer support are compromising their futures, because sales and support are two sides of an equation that must balance. Sales require service, and good service generates future sales. One is not sustainable without the other.
- **Effective Online Web Based CRM drives additional traffic to your web site, which can generate further sales and increase revenue.** Customers visiting your web site for support information will also be exposed to promotions and news about your products and company. This provides an opportunity for you to increase

sales. Product tips or other useful information posted on your site will help customers get the most out of their purchase. The increasingly interactive nature of the web has fostered an expectation of interaction and response, and you can capitalize on your customers' interest in this kind of interaction to form closer relationships with them and provide them with a sense of community. You can also use increased interaction with customers to gather valuable customer and marketing information.

The Most Common Hurdles

Companies that have not implemented effective Online Web Based CRM are failing to take full advantage of the Web's potential to improve their customer satisfaction and retention, and are often struggling with long telephone call wait times, a backlog of unanswered customer e-mails, and huge support costs, not to mention reduced sales and unhappy customers.

Why would they tolerate this situation? There are several perceived obstacles that must be overcome to successfully implement an Online Web Based CRM program, and some companies just don't find their way over the hurdles.

Following are the principal barriers that may delay or prevent a company from launching an effective Online Web Based CRM system:

- **Awareness** - Some companies have simply not recognized how useful the Internet can be as a means of providing customer service, and how powerful a business tool it can be to enable customers to help themselves. These companies may have gone so far as to provide their customers with an e-mail address for support questions, but they are often struggling to manage and answer these e-mails efficiently, and they don't realize that they can dramatically reduce the number of e-mails they are receiving by providing more readily accessible information online.
- **Fear** - There are also companies who understand the potential benefits of Online Web Based CRM, but delay acting on that knowledge, because of the perceived disruption of restructuring their support practices or the fear that they will spend thousands of dollars and many months implementing an ineffective solution. The recent statistic provided in a Gartner Group study that "65% of CRM implementations fail," adds fuel to this kind of fear.
- **Staff Resources** - Trying to provide effective support at a web site without using software tools designed for that purpose means a substantial maintenance and updating burden on existing staff, who are probably already committed to other work.

Poor Implementation - Building an Online Web Based CRM system from scratch has another potential pitfall. If a company's staff doesn't have any experience in designing such systems, there is a good chance of creating a web site which, far from being user-friendly, only serves to infuriate customers.

These companies are likely to end up feeling that Web based support is simply not useful, or they will end up going out and buying another product to actually get a system that works. In this area, there is really no need to reinvent the wheel. For there is now a plethora of Online Web Based CRM products available in all price ranges, and there are bound to be off the shelf solutions that are compatible with a given company's needs.

- **Cost** - Some companies assume that if they purchase a software tool that will manage their Web support, the cost will be beyond their means. It is true that, depending upon the software tool chosen, software prices alone may reach into the

hundreds of thousands of dollars, even the millions. But there are also highly effective solutions available at much more reasonable prices.

When looking at cost projections, implementation time should also be considered. The most expensive solutions are often also the most expensive to implement, taking weeks or months of time to customize, train staff, etc. And they don't necessarily reduce ongoing maintenance time and costs once they are installed and operational.

Again however, quick, out of the box solutions are also available that can be up and running in production in a day or two.

- **Knowing Where to Begin** - This is a big one, since there are so many options available, and so many software programs with overblown claims, that it is difficult to know where to start. There are two critical and interrelated stages to implementing any new system:
 - **Choosing the best software tool for your budget and needs**
 - **Deciding upon the business practices you want to implement and the functionality you want to provide to your customers**

Beyond that, internal company discussions about the ideal way to provide information to your customers over the Web, based on your business and the kinds of customers you are supporting, are essential. Creating a wish list of functionality and features is also useful for narrowing down your software selection.

While these hurdles may look daunting at first glance, implementing an effective solution doesn't have to be a major headache, cost an arm and a leg, and take forever. Following the guidelines outlined below can make it a straightforward and efficient undertaking that can quickly pay for itself and please both technical staff and customers.

It is important to recognize that the cost of failure is quite high. Companies that do not offer effective answers to their customers at their web site are missing out on sales opportunities, losing the opportunity to get valuable feedback from their customers, and paying a higher percentage of their revenue in support costs to achieve a less satisfactory result.

The remainder of this white paper offers some guidelines and step-by-step suggestions for how to go about choosing, implementing, and maintaining a successful Online Web Based CRM system that will bring companies of all kinds a high return on their investment. It also examines some success stories and describes some of the benefits that can be expected from a successful implementation.

Steps for a Headache-free and Successful Implementation

So you want to jump on the bandwagon and start reaping the benefits of effective Web based support. Where to begin? Here are some initial things to keep in mind as you make decisions about how to implement such a solution.

General Considerations

- **You don't need to wait for your company to complete a global CRM implementation to start providing excellent Online Web Based CRM** . Some companies are paralyzed by the belief that they must wait to adopt a complete CRM solution to all of their customer interactions, even though this will take months and cost millions of dollars (not to mention the 65% chance that it will fail altogether to provide the expected benefits).

In fact, many companies have found that they are better off adding CRM components to their business one step at a time, and going with individual, best-of-breed solutions for each component, rather than going with a large scale solution. This reduces the risk while providing quicker returns. Recent studies have shown that providing satisfactory customer support is viewed by management as the most important function of most CRM implementations, and for most companies, this makes implementing an effective support solution a logical first step of such a strategy.

Even if the company has decided to go with a major CRM package that will take months or years to implement, it often makes sense to use an interim solution to provide Online Web Based CRM, since the return on investment of a quickly implemented system is almost immediate. The availability of relatively inexpensive internet support solutions makes this a risk-free choice, since there is no investment in infrastructure and the solution can generally be in production in a short time frame.

- **The most efficient support system is one that allows you to integrate and manage all your support communications under one interface.** Adding Web support doesn't mean eliminating telephone support and reducing the options for your customers. It should mean empowering your customers to use the method of getting answers with which they are most comfortable. If they have been asking questions via e-mail, you will probably want to continue to enable this, so you want your new system to process and manage these e-mails more effectively.

A knowledgebase type system that allows new items to be created by e-mail submission, web form submission, customer telephone calls, and even customer faxes offers many advantages. It permits you to gradually move from whatever kind of support you are currently providing to one that is less expensive and more efficient, while providing a single interface for your support staff to use. Ideally, all your support contacts should result in a new item, or ticket, being created (or updated) in the knowledgebase - this way, all staff can have access to the complete body of knowledge about outstanding support issues and can use this body of information when responding to customers.

- **Excellent FAQs are fundamental to reducing your support costs, but static lists of FAQs are a thing of the past** (actually, too many companies are still using them, but they are paying the price in high maintenance costs and slower response times). An effective system should be able to dynamically create FAQs and make them immediately available to your customers at your web site without any need for HTML editing or manual action. That is, as an item in the knowledgebase is resolved, if it is relevant to other customers, a qualified staff member simply cleans it up as needed and clicks a single button to have it automatically join the part of the knowledgebase that is accessible to customers searching for information at your web site. This should not mean copying, pasting, editing HTML, manually uploading or any other such action on the staff person's part - any effective knowledgebase software should handle all of this for you automatically. This is critical, since providing effective, timely, and well prioritized FAQs is one of the most important things you can do to reduce support incidents that cost you money.

- **You may want to consider restructuring the way you charge customers for support.** For instance, if you currently offer free telephone support and receive most support issues over the telephone, you might want to move to a model where you offer free e-mail and Web based support, but charge for telephone calls. This encourages customers

to search your web site first for an answer, then to submit their question via the Web, and if they really need to speak with someone, to call as a last priority. This can dramatically reduce the number of phone calls and your support costs.

- **One way to nudge customers in a certain direction is to tell them that using your preferred means of submission will give them a better response time.** For instance, if your customers currently ask questions by e-mail, and you want them to fill out a web form so you can collect more information from them (like their registration number, support contract number, or even just their name and address), you can lead them first to the web form, but still offer an e-mail option, with a caveat on the e-mail page that tells them they will receive higher priority and a quicker response to their submission if they submit the web form.

You can use this tactic to gradually move customers away from an e-mail based system to a Web based system. This is useful because customers who submit a ticket directly through a web form can be asked to provide more information that can help solve their problem in one communication. This can reduce the number of contacts needed to solve problems, and therefore the support costs.

- **Keep in mind as you look at software that there are some important benefits to using a pure Web based application, rather than a client-server based, "Web-enabled" product, to handle all your support issues.** Among the benefits: 1) Easy software maintenance, since no client software is needed other than a standard browser, and the program can just be installed once on a Web server; 2) Complete access to the system for staff members who may be geographically dispersed; 3) No need for network infrastructure; 4) Pure Web based products were designed from the beginning to maximize performance on the Web.

Step by Step Guide

Following is a practical, step-by-step guide for implementing a Web based support system. If you follow the steps outlined below, you really can't go wrong.

- **Decide upon what, in an ideal world, you would like your new Online Web Based CRM system to do.** The answer of course depends upon your business, your customers, how Web-savvy they are, what they expect, what your competitors are doing, what kind of staff you have, and so on. If you have 2 support staff technicians and you only get an average of 3 calls a day, your needs will clearly be very different than if you have a support staff of 40 receiving 3000 e-mails a day.

Here are some things you may want to ask of your new system:

- Do you want the system to provide dynamic FAQs for your customers to access, automatically prioritized by those that are most helpful, and displayed in a way that you choose?
- Do you want to let only your customers, or any unregistered visitors to your site, search through existing FAQs? Do you want unregistered visitors to see less information than registered customers?
- Do you want the ticketing system to be fully integrated with the knowledgebase?
- Do you want to let visitors and/or customers submit questions directly over the Web?
- Do you want new support tickets (questions) to be automatically routed to the appropriate support group or individual for handling?
- Do you want other automatic routing to be enabled so that a ticket passes through specific stages before resolution?

- Do you want to have your telephone support staff able to search the knowledgebase for answers while taking calls and also to enter tickets into the knowledgebase?
- Do you want e-mails submitted to a support e-mail address to be converted automatically into tickets in the knowledgebase and assigned and routed appropriately?
- Do you want to be able to send e-mails to anyone under any user-defined circumstance (in other words, to be able to define an unlimited number of escalation rules)?
- What do you want to happen when a customer submits a ticket? Should he receive an e-mail response, should he be able to log in again and track the progress on his ticket, and update the ticket if he has new information? Should he be able to change his user information?
- Should new customers be able to register themselves or do you want only staff members to be able to create new users?
- When a ticket is resolved, do you want your system to automatically send an e-mail to the customer with the resolution? Do you want the customer to be able to reply to the e-mail and have it update his original ticket?
- Do you want to be able to simply publish tickets as they are resolved so that they join the body of FAQs accessible by customers, or do you need to route resolved tickets to someone for cleanup before potential publication?
- Do you want the whole system to look like it belongs to you with your logo on the login so your customers don't know they are in another program?
- Do you get a lot of repeat questions, so that you would like to have the ability to easily paste standard solutions into new tickets?
- What kind of reporting on support activity do you need?
- What different groups of users should the new system serve - potential customers, real customers, resellers, partners, support staff, management? Do you need to give these different groups different levels of access to the information in the knowledgebase?
- Do you need to be able to create your own fields, choices, saved searches, business rules, and so on?
- How many people do you expect to be using the system and do you want them all to be able to login and submit tickets or do you want some of them only to be able to search and print out FAQs? Be sure to consider your needs right now as well as your most optimistic future projections to be sure that the system you set up will scale as your business grows without breaking the bank and reducing performance.

We have found that these are the most important issues that need to be addressed in designing a successful Online Web Based CRM system. When purchasing support software, you will want to be sure that the capabilities of the software are consistent with your answers to these questions.

- **Decide upon the total budget that you can commit to getting this new system in place.** This budget will need to cover the cost of software licenses plus any implementation, customization, and training costs. You should also include the time that will be required of your in-house staff to assist or carry out the implementation.
- **Decide whether or not you already own any software that can provide the functionality you want or whether you will need to purchase software.** If you need to purchase software, it is a good idea to write down your wish list of functionality, then research the different software options and contact different vendors, keeping in mind your overall budget.

Also, be wary of the notion that you might be able to save money by developing your own system. Many of our customers tried that first and found it incredibly time consuming and ultimately unworkable. Months after having started their own development and having no system in place to show for it, they purchased or leased our software and had it up and running in a day for much less money than they had already spent in development costs.

- **Determine an ideal time frame for implementation - can you wait months for a new system, or do you need it yesterday?** Are you about to launch a new product and to have increased support demands? Or are you currently developing and testing new products that are crying out for a Web based bug and enhancement tracking system to help get them to market more quickly?

If so, you want a system that is quick and easy to implement and that allows changes to be made later, preferably without bringing down the system, so you can get it into production immediately and gradually refine the processes and customization after some initial experience.

- **Think about how much your needs are likely to change over time and consider the importance of flexibility in the system you set up.** Some companies may have in place a series of business procedures and rules that have remained stable over time. In this case, the ease of making changes may not be that important. Other companies may feel it is important to be able to change their procedures quickly and painlessly to move with changing market forces or customer needs.

Many support systems may permit customization but make it so difficult (many of them requiring you to shut down the system to make changes) that you will want to finalize your needs as much as possible in advance to avoid changes later. Unfortunately, it is almost impossible to get this kind of thing perfect the first time, and experience with any system gives you ideas for how to improve and refine it.

Therefore it is helpful to take into account the ease of making changes dynamically when considering software products and implementation time. For instance, Cynergy can be customized and modified while live without any interruption of service. If you go live then decide you would like to add another field or change the choices on an existing field, this takes 5 minutes to do through the GUI and takes immediate effect on all new and existing tickets. This kind of flexibility allows your staff to experiment with different support practices and procedures to find the ones that are most effective.

- **Consider what kind of ownership model you are comfortable with.** Do you want to install, maintain, and run the software on your own web server and to buy a permanent software license, or would you prefer to lease the software on an ASP model? Generally ASP service means that the vendor hosts the software on its own site, doing all installation, upgrades, backups, and maintenance, but providing you with full administrative access to your system and ownership of your data.

If your IT staff is limited and you don't already have the hardware to run a high performance system, this may be an attractive option. And it can be a very inexpensive way to get a high powered system up and running quickly. For instance, Cynergy Software's ASP service costs as little as \$69/month per user or \$475.00 per month (for 10 simultaneous users) and a new customer is typically up and running within 24 hours of submitting an order.

- **Once you have carefully considered these issues, your next step is to decide which software to use and whether to buy or lease it.** If you have time, try to use each product you are considering live, whether by going through a live demo or by logging onto one of our demo sites. This should give you the information you need not only about functionality, but also about performance, ease of use, ease of customization, and so on.

Consider whether you will be able to implement the product yourself or will need to purchase consulting, customization, and/or training services from the vendor.

- **Once you have the software installed, revisit the questions above and make detailed decisions about how you want your system to work.** Be sure to consult the appropriate staff who will be using the software to help define the business procedures and support practices you want to implement.

If you are setting up this kind of support for the first time, you may want to seek advice and help either from the software vendor, or from helpdesk user groups and other helpdesk resources. If the vendor provides any tutorials or other forms of implementation documentation, it can be helpful to review them. And check out the software documentation to see if it provides insight that may help you get the best and most efficient implementation.

Note that **figuring out how you want things to work is probably the most important step for a truly successful implementation.** If the software you choose is easy to use and flexible, actually implementing your procedures is the easy part. Deciding what they should be is another matter, and the software can't really do that for you.

For instance, Cynergy Software was designed to be very easy to customize and flexible enough to handle almost any business procedure, with the idea that this way, customers could easily do their own implementation and customization. And most customers have done just that, with perfect success.

We have also found, however, that some customers will end up with a "better" implementation if one of our professional services staff members helps them with the "procedures planning and business practices" part of the implementation, sharing our experience on the kinds of support procedures that have proven to be most effective and the most efficient ways to set them up in Cynergy Software.

- **Customize the software** (or have someone else customize it) to meet your specifications.
- **Be sure to train your staff** and provide them with some simple documentation on how to use the new system.
- **Have your staff test the system, by entering new support tickets as customers and then processing them.** This way they will understand what the system looks like from the customer's point of view as well as their own. Make any refinements needed after this testing, then you are ready to go live!
- **Once you have everything in place, it's time to provide the appropriate access to the new system from your web site.** Have those responsible for your web site create links into the new system and edit your support pages to make your new capabilities clear to your customers.

It's a good idea to also provide an e-mail link for customer feedback on the new system and to actively solicit this feedback, especially in the beginning. Try to put such links at several points in the new system, for instance on the main support page. This way, you are more likely to learn quickly how the system is working for those it is supposed to serve and to be able to make any needed adjustments.

- **Once you go live, schedule a review of the system for 30 to 60 days out** (sooner, if you have very high volume or receive negative customer feedback). At that point, invite feedback from staff members using the system, review any customer feedback received, agree upon changes that will improve the system, and make those changes.

- **To be sure your system meets changing needs within your company, your customers, and your product lines, revisit the system periodically**, say every few months or so. Each time, consider feedback from customers, partners, and support staff, and look for any changes that can be made to improve functioning.

The Rewards of a Successful Online Web Based CRM system

While the tasks described above may seem a bit overwhelming, the rewards of a successful implementation are great and will quickly pay for the effort involved. An effective Online Web Based CRM system will result in the following benefits:

Reduction in customer support costs

- **\$10-\$40 is saved** on every occasion when customers can find answers at the web site, rather than having to telephone a conventional call center.
- **By continuously adding customer-driven content to the FAQ site, you achieve a snowball effect**, increasing the percentage of customers who can help themselves without increasing your support costs.

Improved customer relationships

- **Empowering your customers to find the answers they need at your web site** without having to wait on hold on the telephone or submit a ticket and wait for a response **is the fastest way to increase customer satisfaction and forge better relationships with your customers.**
- **A useful site becomes a focal point for the community it serves**, and the company is seen as the centrally important player in that community. The better the site, the better the reputation of the company.

Increased traffic and attention at your site

- **A useful site is soon 'bookmarked'** by repeat visitors and it attracts an ever-wider audience of prospective clients. That increased audience frequently leads to press attention, and may lead to word-of-mouth recommendations.
- **More current and useful material holds greater interest.** Visitors who find something useful on your site will spend longer looking at each page and look at more pages. This allows you to present more branding and marketing information.

24/7 Operation

- **Online support scales itself according to demand.** How many companies can afford to staff a conventional customer service desk through 3 shifts every day? With an online system, you can still page support staff in emergency situations and you can be gathering customer questions at times that are convenient for the customer.

Relieving IT staff and making the best answers available to everyone

- **Qualified staff can concentrate on more fruitful, strategic projects** because the repetitive, time-consuming work is all automated. Furthermore, their knowledge is recorded and shared with everyone, rather than restricted to the customers they deal with. Once you populate your knowledgebase, you can always give customers the best answer for a given question.

Improved perception of investors, shareholders, and partners

- **Impress your partners and investors by being on the cutting edge of support.** With an Online Web Based CRM offering, you will be more attractive to

potential partners, since they will have 24 hour access to information and support. Such a system also demonstrates to your investors or shareholders that you are at the forefront of technological advance and that you take customer support seriously.

The overall effect of automating customer support with the appropriate helpdesk software is that each benefit you provide does not just pay for itself, but snowballs, repaying with compound interest.

Revisiting the Barriers to Implementation

While one company or department struggles along with e-mail, telephone calls and post-it notes, another has an integrated system up and running and is harvesting the benefits. This section re-examines some of the obstacles and common excuses used to delay implementing this kind of support system and evaluates the reality behind them.

A system like this is expensive. We need to plan a budget for it.

State of the art software, with an unlimited number of simultaneous logins can be purchased for under \$10,000 and should pay for itself within a month or two. If it doesn't measure up to your expectations, you should be able to simply return it.

If you are a small company, remember that you can give unlimited end user access to a dynamic web based FAQ system and have 3 simultaneous logins for support staff at absolutely no cost using Cynergy Software.

Something like this takes a lot of planning, we need to put a committee together to write a strategic implementation plan.

While the committee is setting the agenda for their first meeting, your competitors have their sites up and running. While the committee is revising the introduction, your competitors are refining and improving the system based on real world experience. While the committee is preparing the table of contents, your competitors are growing their knowledgebases and reputations for customer support.

The bottom line is that customers don't care as much about strategic plans as they care about what you did for them this afternoon and what you are going to do tomorrow. And yes, it does take some analysis and planning to get a great implementation, but this doesn't have to be a long term project. We provide our customers with an implementation worksheet that walks them through the important questions and helps get them up and running quickly.

It takes months to implement something like this.

If you choose the right software, it will take less than a week. Many companies have put complete Web based customer systems, with dynamic ticketing functions, automatic escalation and complex workflows into full production use in just 2-5 days.

We need the best and that costs a lot of money.

The best software is not always the most expensive. In fact, less expensive software is generally more reliable because the manufacturers cannot afford high support costs. Examples abound -- Linux is rated higher than NT for performance and reliability, MySQL is faster and more reliable than Oracle for most applications, and Cynergy Software has beaten competitors costing 5 to 10 times as much purely on the basis of functionality, reliability, and performance.

This is a big decision. It would be a disaster if we got it wrong.

Doing nothing is also a big decision and is guaranteed to be the wrong one. If you choose a system with over five years of full production use, an enthusiastic user base, 30 day money back guarantee and an average implementation time of less than 1 week, how far can you go wrong?

Four Principles of Success

Once you have implemented your new system, what is really needed to make Online Web Based CRM successful? We have identified four basic principles to follow:

1. Prioritize effectively

In setting up online customer service you cannot expect to have an answer to every possible question ready for your customers, but you can judge what information is most essential, and take care of the vast majority of matters without delay. Creating as extensive and rich a body of initial FAQs as possible will reap the most immediate benefits, as it enables more customers to find answers without having to submit questions.

2. Listen implicitly

As well as responding to the explicit requests, you must be attentive to patterns of requests that indicate where problems or difficulties exist. For instance, if you receive several questions from customers exhibiting confusion about an aspect of your product, it may be a sign that you need to improve your documentation in that area.

3. Respond quickly

Immediacy is part of Web culture. Use the information given by the patterns of request to improve the content of your web site promptly. Make sure incoming e-mail and ticket submissions receive an immediate acknowledgement with more information about when a resolution may be expected. Automate your processes so that as soon as a ticket is resolved, the resolution is e-mailed to the customer.

4. Facilitate navigation and communication

Make it easy for customers to find the information they need. Make access to FAQs obvious and also make it clear how to ask for more help. Wherever a visitor has been directed in the site, it should be clearly signposted how to submit a question or make a telephone call.

We hope the above white paper has been useful to you. If you have further questions, please call 405 516 2420 or email us at sales@cynergysoftware.com