

# People are the priority

For CRM software to work, it is crucial to invest in your staff first. Michael Anglin explains how staff need to be sold on the concept of adding value to customers

**W**hen is the right time to buy CRM software? Before or after a culture change programme? It's a 64million dollar question, and is there even a right answer? The truth is that it depends on your priorities or what your agenda is. To the technology experts, it's probably more important to buy your software first. However, to me, a director of change management, of course I would say invest in your people first.

Why? It's simple: every time money is spent on technology and not on your employees, it sends the message that they are not as important and don't matter as much, and they'll vote with their feet.

Senior executives will often quote that well used phrase: "People are our biggest asset", but when it comes to the crunch, stuck between a rock and a hard place they tend to invest in technology every time, yet

isfaction. The system is seen as technology, but it is the staff who use the systems. At Minerva, we are involved in culture change programmes that happen during or after the implementation of CRM solutions, rarely before, yet coincidentally on the occasions that we have done the culture change first the bottom line results have been amazing.

One such occasion was with a major player in the financial services sector that found themselves operating in a market place that was vastly different to the one that existed ten years ago. Business statistics showed that they were not holding their own in the cross holding section – which is related to how many products a customer holds – where they were trailing the national average. Therefore, something had to be done and attention was turned to the direct service operation, as this was seen as the perfect opportunity to affect the statistics as there were thousands of

thing, but rather were a function of good customer service.

Advisers and managers were then trained on how to offer relevant product information to customers. They were taught how to develop conversations with customers that gave the adviser an insight in to what products would be not only relevant, but also useful, add value and enhance the customers' experience. In addition, managers were also trained in how to coach and develop advisers.

The company then made changes to the environment and the way the advisers were measured so that they felt able to give customer conversations enough time to develop. They abandoned the old metrics and removed the wallboards.

**Now, advisers are** no longer measured on talk time but rather on their customer service and the number of quality leads they produce. They are also able to track the leads produced through so that they know how well they are converting. There were even changes made to the managers' working day so that they were able to spend much more time coaching their advisers.

The change actually came about after consultation with the advisers, and over the course of 12 months a rapid change occurred in the culture of the organisation and its attitude to sales. They have gone from strength to strength and now four years later continue to compete in the marketplace at the very highest level.

Following on from the programme, the company implemented a CRM software system and, as a result, the implementation has been more successful because the hearts and minds of people were already sold on the concept of adding value to customers and the link to using the system was a short and very appropriate step to take. ■

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**CRM will be most successful if the hearts and minds of staff are sold on the concept of adding value**

wonder why they don't see the full benefits from the cash invested. So how much is potentially being wasted?

A recent report, *CRM in the retail finance sector*, shows that 25 per cent of companies in the retail finance market planned to invest in call centre applications and it's estimated that approximately £586million would be spent on CRM solutions. But what exactly is a CRM solution?

**Whenever CRM is mentioned** it seems to conjure up a picture of new software packages and fancy screens; technology in other words. But what does 'customer relationship management' mean?

To some it means creating a system that gives us the capability to find customer data, highlight cross selling opportunities, retain customers and increase customer sat-

customer enquiries every day.

By encouraging service centre advisers to generate good quality leads which direct sales would follow up, they could increase cross holding with moderate investment.

The results were fantastic and the programme paid for itself many times over with the cross holding figure rising from 1.4 to 1.6.

How did they do it? A total of three areas – consisting of skills, attitudes and infrastructure – were focused on. A 'sales through service' programme was developed, which first of all focused on the advisers and managers' experience of doing the job, what they thought about sales and dealt with any beliefs and attitudes they had that would limit their potential. It was important that they understood that sales were not a bad