# The CRM Handbook: A Business Guide To Customer Relationship Management

Addison-Wesley Information Technology Series

## The CRM Handbook

### A Business Guide to Customer Relationship Management

"Each chapter's 'Checklist for Success' is a tool every CRM executive can use. Whether you're just starting to think about CRM or looking to turn a profit on your CRM investment, this book will prove to be a solid reference guide."
—Don Peppers, Partner, Peppers and Rogers Group

Jill Dyché

# Synopsis

Praise for The CRM Handbook  â œWant to avoid being one of the estimated 70 percent of companies who have tried implementing standalone CRM systems and failed? Confused by what your IT suppliers are telling you about â ˆCRMâ ™? Then you need to read this book! Jill provides acomprehensive, practical, and easy to understand view of CRM and shows you how to successfully implement an enterprise customer-focused solution.â •Â Â Â Â Â Â Â Â Â â "Kevin Bubeck Â Â Â Â Â Â Â Â Â Â Â Â Director, North America Information Strategy, Coca-Cola â œCRM could be viewed as the ERP of the 2000s. As such, there will be multiple winners and losers as the marketplace places some large and strategic bets on this technology. In any case, Jill DychÃ© has captured the importance of the concepts and value derived through CRM solutions. Those needs will evolve, of course, but companies will always need the basics that have been discussed.â •Â Â Â Â Â Â Â Â Â â "Brian Berliner Â Â Â Â Â Â Â Â Â Â Â Â Â Co-founder & EVP, Product Development, Acies Networks â œThe CRM Handbook provides information for the business person who is trying to understand CRM and how it can effect his/her business. It goes beyond the hype of the acronym and dives into the real issues that a company needs to consider before implementing a CRM solution.â •Â Â Â Â Â Â Â Â Â â "Joy Blake Scott Â Â Â Â Â Â Â Â Â Â Â Â Â Director, Marketing and Communications, Fastwater, LLP â œI havenâ ™t read anything that has such a practical approach. I view the book as having multiple benefits. It gives a good definition of CRM functionality but also gives detailed guidance of how to approach CRM in your organization.â •Â Â Â Â Â Â Â Â Â â "Francine Frazer Â Â Â Â Â Â Â Â Â Â Â Â Â Principal Consultant, Net Perceptions â œEven better than defining CRM, Jill took on all of the hyperlanguage around CRM and clearly differentiated the various incarnations of CRM. Itâ ™s also usefulto know what can go wrong and the potential affects of such missteps. Too few authors level with readers about pitfalls!â •Â Â Â Â Â Â Â Â Â â "Linda McHugh Â Â Â Â Â Â Â Â Â Â Â Â Â Director, Professional Services, Cygent Inc. â œThe guides based on the business tools that Jill uses with her own clients are fabulous.â •Â Â Â Â Â Â Â Â Â â "Robin Neidorf Â Â Â Â Â Â Â Â Â Â Â Â Â President, Electric Muse/Clioâ ™s, Pen Research & Interpretation, Inc. â œThe language is easy to read and easy to understand. Terms were well explained so that someone with no prior CRM experience could easily understand the text.â •Â Â Â Â Â Â Â Â Â â "Marcia Robinson Â Â Â Â Â Â Â Â Â Â Â Â Â President, e-Business Strategies â œAn excellent study into what defines todayâ ™s best practices in the CRM industry.â •Â Â Â Â Â Â Â Â Â â "Gareth Herschel Â Â Â Â Â Â Â Â Â Â Â Â Â Senior Research Analyst, Gartner Research â œJill writes very well. Her writing communicates subjects and topics in

a very easy to understand way. At times, I felt like I was listening to her speak or discussing a subject. She is a good communicator! Jill did a very good job of covering all subject areas on the different topics of CRM. I am most impressed with Jill on pointing out all the possible mistakes and creating â ˆlessons learnedâ ™ advice which most authors frequently omit.â •Â Â Â Â Â Â Â Â Â â “Mary Chan Â Â Â Â Â Â Â Â Â Â Â Â Information Management Consultant, Kagiso Inc. â œJill DychÃ©&#39;s  The CRM Handbook  is a good read for CRM novices and seasoned practitioners alike. DychÃ©&#39;s well-written, pragmatic approach to understanding CRM&#39;s evolution and purpose is a map to a successful CRM program. DychÃ© uncovers the truth behind the CRM software vendor hype, highlights some common roadblocks to CRM project development, and describes how to delineate and prioritize CRM initiatives.â • Â Â Â Â Â Â Â Â Â â “Don Peppers Â Â Â Â Â Â Â Â Â Â Â Â Partner, Peppers and Rogers Group To compete in today&#39;s competitive marketplace, customer focus is no longer simply nice to haveâ “it&#39;s a fundamental mandate. This book is a manager&#39;s best friend, providing both a primer and a how-to guide to defining and implementing Customer Relationship Management. It shows you:   The various roles CRM plays in business, and why it&#39;s more important than ever The range of CRM applications and uses, from sales force automation to campaign management to e-CRM and beyond The context of some of the popular CRM buzzwords The differences between CRM and business intelligence, and why they&#39;re symbiotic Why the customer-relationship failure rate is so high, and how to avoid becoming another CRM statistic Case studies of visionary companies who&#39;ve done CRM the right way   â œWe read this book at a time when we were relooking at our customer information strategy. One of the first things I had to do was ban the term â ˆCRMâ ™ from the project because of the vendor and industry hype and the confusion it created within the team. Jillâ ™s book provides a strategic look at the topic from both a business and IT perspective. The insights she provides allowed me to focus on the strategic issues planning an enterprise-wide, customer-focused solution. And yes we are once again using the term â ˆCRMâ ™.â •Â Â Â Â Â Â Â Â Â â “Kevin Bubeck Â Â Â Â Â Â Â Â Â Â Â Â Director, North America Information Strategy, Coca-Cola â œJill is one of the few people who has been at the forefront of every stage of CRM development, from the early days of data warehousing, through business re-engineering, to sales force automation and e-CRM. This makes her uniquely qualified to write about how it should all come together. The reader will be rewarded with advice drawn from real-world experienceâ “both successes and failures. I shudder to think at the dollars that have been wasted over the years on CRM projects and how much will be wasted in the future by executives who won&#39;t read The CRM Handbook.â •Â Â Â Â Â Â Â Â â “Brian Hoover

Â Â Â Â Â Â Â Â Â Â Â Â President, TouchScapeâ„¢ Corporation â œThe CRM Handbook provides an outstanding roadmap for putting human contactâ "relevant, accurate, informed human contactâ "back at the heart of the business-customer relationship. That&#39;s the challenge and the sole goal of Customer Relationship Management.â •Â Â Â Â Â Â Â Â Â â "Charles D. MorganÂ Â Â Â Â Â Â Â Â Â Â Â Â Â Â Â Â Â Â Â Â Â Â Â Â CEO and Company LeaderÂ Â Â Â Â Â Â Â Â Â Â Â Axiom Corporation â œJill DychÃ© has produced a wide-screen, comprehensive picture of CRM that also focuses on key issues that matter to CRM users. This book is written for those who are time-constrained and quick on the uptakeâ "everyone from the CEO to the marketers and technologists who will evaluate, implement, and benefit from CRM initiatives.â •Â Â Â Â Â Â Â Â Â â "Peter Heffring Â Â Â Â Â Â Â Â Â Â Â Â President, CRM Division, NCR Teradata â œJill has masterfully compiled scenarios, resources, references, definitions, and insightful recommendations about how to remain customer-focused across the enterprise functions. The book can be used as an educational tool, reference guide, and resource for short-listing technologies to evaluate.â •Â Â Â Â Â Â Â Â Â â "John Earle Â Â Â Â Â Â Â Â Â Â Â Â Â President, Chant Inc.

## Book Information

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## Customer Reviews

This book is thorough, clear and filled with useful information. It's organized in two parts. Part 1 defines CRM in chapter 1 and in the next six chapters covers the reasons and issues for implementing CRM from five perspectives: (1) Marketing, (2) Customer Service/Call Centers, (3)

Sales Force Automation, (4) E-business and (5) Data Analysis. The case studies, all based on real clients and situations, add life to the well written chapters on marketing, customer service and sales force automation. In addition each chapter contains nuggets of insight, clear discussion of the topic and numerous checklists and tables that you can use for your own projects.Part 2 covers delivering CRM and is structured in the logical sequence of planning, tool selection and CRM project management. Like the first part of the book the four chapters in Part 2 contain case studies, checklists and excellent advice. It is in this part of the book where you'll benefit from Jill's experience because she reveals common traps and pitfalls, and gives advice on how to deal with them or bypass them altogether.What I like about this book is that it covers the business and technical parameters, requirements and issues. Jill's writing style makes it not only readable, but engrossing as well. She goes into considerable detail about how and why CRM is important to meeting business requirements and gives business metrics, explains differences between CRM and business intelligence, and the pro's and con's of all issues and factors. Because she covers the subject from the five perspectives I listed above this book is valuable to all possible stakeholders in a CRM project. I especially liked her use of the Porter value chain and how she leads you through the development of a business case for CRM.

Jill Dyché is one author who never disappoints, and this book is as straightforward and balanced as her first, e-data. Like her first book this one is a balance between technical and business aspects that make it suitable for IT and business process owners. The technical topics are so clearly presented that business process owners will have no trouble understanding them, yet are sufficiently wide that even seasoned IT professionals will learn something new. The same for the business topics: Ms. Dyché's deep understanding of the business issues ensures that subject matter experts from the business side will come away with ideas and knowledge, while their IT counterparts will have a keener appreciation for the issues and challenges faced by their constituents.What makes this book especially valuable, though, are the wealth of checklists, do's and don't's, and case studies that are real - so real in fact that I couldn't help but both admire her clients who allowed themselves to be quoted, and the obvious persuasive power Ms. Dyché used to obtain their permission to quote them. In fact, power is something Jill exhibits throughout this book. Like her first book she in which tells it like it is, she is quick to point out the good and the bad - and nothing escapes her notice. More importantly, her frankness is contagious and inspires you to take the same approach. A priceless example is given in chapter 10 where she tackles company and project politics head on. Most consultants will do anything to remain politically correct, resulting

in wishy-washy advice that is filled with qualifiers. Not Jill - she calls 'em as she sees 'em, and the net result is advice that you can use to tackle thorny issues that everyone knows about, but nobody wants to bring up.

The CRM Handbook: A Business Guide to Customer Relationship Management Data Mining Techniques: For Marketing, Sales, and Customer Relationship Management Salesforce CRM - The Definitive Admin Handbook - Third Edition Salesforce CRM: The Definitive Admin Handbook - Second Edition Social Marketing to the Business Customer: Listen to Your B2B Market, Generate Major Account Leads, and Build Client Relationships Refining Design for Business: Using analytics, marketing, and technology to inform customer-centric design (Graphic Design & Visual Communication Courses) Wake Up Your Call Center: How to Be a Better Call Center Agent (Customer Access Management) Gestalt Psychology: Influence customer perceptions and make advertising more memorable (Management & Marketing Book 7) BUSINESS:Business Marketing, Innovative Process How To Startup, Grow And Build Your New Business As Beginner, Step By Step Online Guide How To Effective ... Grow And Build Business As Beginner) Home Based Business Escape Plan: How To Make $10,000 Per Month With Your Own Part-Time, Online Lifestyle Business: Home Based Business Ideas (Home Based Business Opportunities) Microsoft Dynamics CRM 2016 Customization - Second Edition How to Start a Business Analyst Career: The handbook to apply business analysis techniques, select requirements training, and explore job roles ... career (Business Analyst Career Guide) The Relationship Skills Workbook: A Do-It-Yourself Guide to a Thriving Relationship How To Stop Worrying and Start Living - What Other People Think Of Me Is None Of My Business: Learn Stress Management and How To Overcome Relationship Jealousy, Social Anxiety and Stop Being Insecure The Post Traumatic Stress Disorder Relationship: How to Support Your Partner and Keep Your Relationship Healthy Committed to Love, Separated by Distance: How to Thrive in Your Long Distance Relationship (Relationship and Dating Advice for Women Book 8) Contextual Design: Defining Customer-Centered Systems (Interactive Technologies) Customer Information Control System: Applications, Development and Programming (Macmillan database / data communications series) Business Buyer's Guide: 1998 AT&T National Toll-Free Directory Business Edition (National Toll-Free and Internet Directory : Business Buyer's Guide) Siblings and the Family Business: Making it Work for Business, the Family, and the Future (A Family Business Publication)