

Customer Account Management Fast Track Pilot

The Customer Account Management Fast Track Pilot Service is a fast, low risk and affordable way for an organisation to experience the benefits of a CRM solution in its own environment. In most cases it will demonstrate the validity and applicability of the technique – not just the software – more quickly and cost effectively than a typical in-house or consultant led evaluation. The pilot will use the proven Contacts Suite™ software from Care Business Solutions.

Business needs addressed

Organisations of all types and sizes are realising that to sustain their businesses they must improve the way that they service and care for their customers. Customers will tolerate service innovations such as centralised call centres, touch-tone phone menu routing, etc., if they are then guaranteed fast and effective service whatever their reason for calling.

Most organisations have multiple legacy systems containing a rich diversity of information about an individual customer's transactions, but no way of obtaining a holistic view of the customer as an entity. Not all customers are of equal value but how is an operator handling a call to know whether the person at the other end of the phone is a regular complainant or a long-standing high-spending customer who needs to be cosseted? Perhaps this person is calling in a personal capacity but makes major purchases in their professional life.

The value of CRM systems is not limited to phone-based operations, or commercial activities. Any organisation that has multi-faceted dealings with inter-related individuals and organisations is a potential beneficiary, from a membership society to a manufacturer to a 21st century dot.com.

Target company profiles

The organisations having the greatest need for this service will be medium sized organisations which have extensive legacy data, coupled with an urgent need to improve some aspect of their customer service. They may have a culture that is wary of technological innovations outside their core business, and sceptical of the value of theoretical evaluations by management consultants.

Others will be aware of the benefits claimed for CRM and want to try it before making a major commitment. They understand that there is more to this than installing the software and are convinced that they cannot afford to be left behind, but are uncertain where and how to start.

Some organisations may have adopted already one of the major CRM packages for corporate purposes but want to benchmark the use of a more economical and less complex system in more dynamic parts of the business which do not fit comfortably into that corporate model.

Business Sectors

The service is applicable to any organisation that is seeking to enhance its relationships with its customers or users, or to handle those relationships more efficiently.

Description of Service Offering

Before starting the project we will define with the customer the objectives and boundaries of the pilot. During the first stage of the project these definitions will be refined and documented fully. The fast track pilot project will include the following:

Scoping

- Definition of solution in customer specific terms;
- Definition of business benefits and pilot success factors.

Analyse and Model

Through a series of workshops with key users:

- Map customer data to Care data models;
- Define process requirements;
- Design customer specific report(s);
- Identify and evaluate solution options.

Design and Develop

- Technical design;
- System set-up and parameterisation.

Validate

- Train super-users;
- User testing;
- User acceptance.

Deploy Pilot

- User training;
- Migrate system to production environment;
- Support for use of pilot system;
- Sign-off.

There are some essential generic limits on the scope of these pilots, to enable them to be delivered for a fixed price in a limited time. The most important of these are that the solution will be based on the core Care TABS module only, and there will be no bespoke programming or data cleansing. The maximum number of licensed users will be twenty. The pilot system will require further work to make it into a robust production strength application: this will be offered for a fixed price after completion and acceptance of the pilot.

Deliverables

The deliverables from this service include:

- Software licences for Care TABS module for 20 users;
- Working pilot system tailored to customer's requirements;
- Development documentation;
- Training of super-users;
- Support for user training and system use during deployment.

Duration

Subject to the availability of customer staff and system resources, the pilot could be completed in 12 elapsed weeks (with deployment beginning in week 9).

Effort Requirements

The effort required by customer staff will vary greatly according to the solution area, the degree of change to be accomplished and the complexity of the legacy systems and operational infrastructure. Most projects would be expected to fall in the range of 30 to 60 days, excluding the time of users of the system during the pilot deployment.

Fixed Price

The Customer Service Fast Track Pilot package is offered as a fixed price package, exclusive of expenses and VAT. This includes software licences for up to twenty concurrent users.

Subject to satisfactory completion of the pilot deployment, TLCC will offer the customer an optional package to upgrade the pilot to a production strength application. TLCC will be pleased to quote for provision of bespoke functional enhancements to the pilot application after completion of the pilot.

Contacts

For more details, please telephone call or e-mail TLCC Global Limited:

Chris Howard, Managing Director, on (07050) 124599 or chris.howard@tlcc-global.com

Julie Irving, Business Development Director, on (07071) 200595 or julirving@cs.com.