



crossXware



crm in the real world

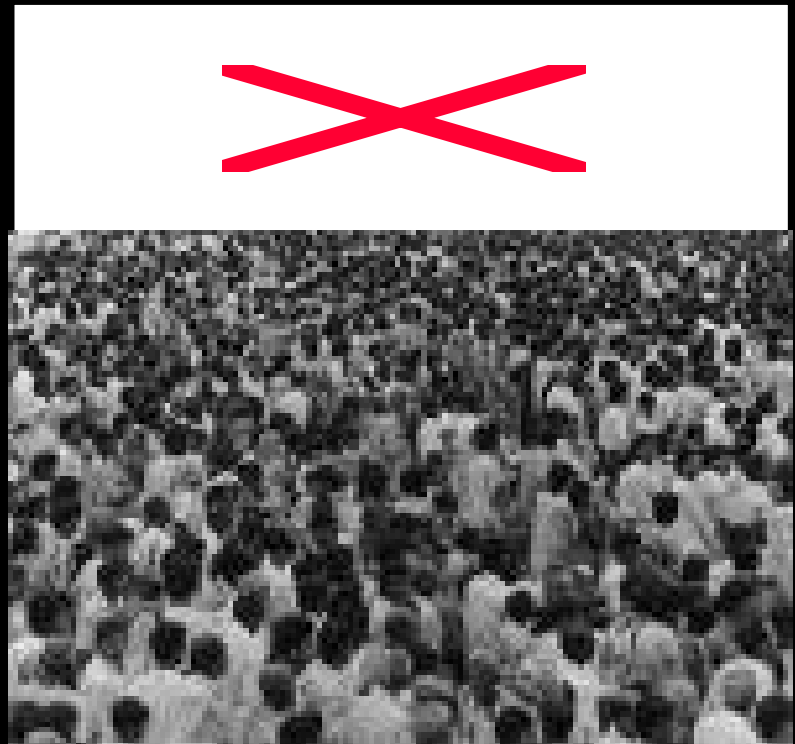
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what makes you *
special?



introducing: vantage point

- Specialist research & marketing consultancy
- Disparate organization:
 - Central HO
 - Consultants working remotely
 - MD with a young family
- Rapid growth
- Simplistic technology infrastructure



the “before” picture

- Each consultant was an island!
 - Not the culture that the founder had in mind!
- No shared record of client communications
- Nobody could view other staff member’s schedules
- Task delegation was not possible
- Financial planning & HR planning was difficult



the “after” picture

- Collective IP of the entire firm instantly available to remote workers:
 - Templates
 - Precedents
- Visibility of all client communications for all staff members
- Predictability of cash-flow and human resource planning



crossware's solution

- Core technologies:
 - IBM domino and lotus notes
 - Crossware crm solution [customized to vantagepoint's exact needs]
- Other technologies:
 - i-notes [web access to pim – email etc]
 - Quickplace [collaboration on-line]
- Services:
 - Server hosting: outsourced to crossware



crossware crm?

- Semi-bespoke solution
- Core code supplies 60% to 90% of most clients needs
- Full disconnected functionality
- Access via lotus notes or using internet explorer



emphasis of crossware crm rollouts

1. Sales support

- Sales force automation [SFA]
- Opportunity management
- Sales funnel – Pipeline reporting / forecasting
- KPI reporting / quotas
- Account management
- Call cycles / Account plans
- Territory management

2. Marketing support

- Direct mail [DM]
- Email marketing [EDM]
- Campaign management
- Telemarketing / Event management
- Profiling / demographics



emphasis of crossware crm rollouts [cont]

3. Service / delivery support

- SLA monitoring
- Call centre management
- Client request [allocation and tracking]
- Electronic forms
- Workflows
- Project management

4. Knowledge management

- Document management
- Knowledge-bases
- FAQ's
- Extranet functionality / Partner hub
- Literature centre [Collateral management]
- Integrated Website / intranet content management



what is crossware crm?

- Developed 100% in New Zealand
- Loads of local success stories:
 - Avanti cycles
 - Ricoh photocopies
 - Omron electronics
 - Livestock improvement corporation
 - Combined rural traders
- Affordable for NZ sized businesses
- Customization is inexpensive



what is ibm domino?

- Unsurpassed disconnected functionality
- Flexibility & affordability [true rapid development environment]
- Unrivalled security features
- PIM built in and ready to go [46% of world's messaging market according to gartner]



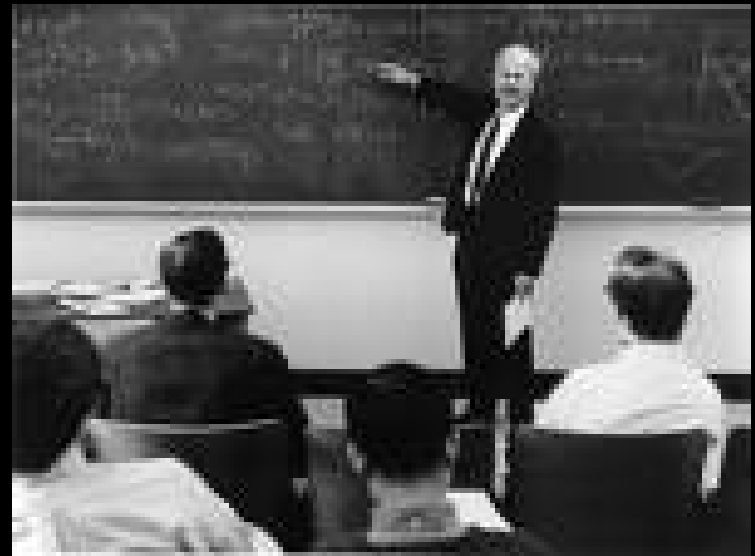
experience of our clients

- crm promotes:
 - True mobility
 - Paperlessness
 - Teamwork & accountability
 - Excellence in customer service
 - Maximized staff output



lessons we have learnt

- What causes crm to fail:
 1. Lack of buy-in from senior executives
 2. Under re-sourcing the project
 3. Changing the scope of the CRM initiative
 4. Attempting to achieve too much too quickly
 5. Insufficient focus on change management
 6. Poor communication with users / uninvolved in the process



one last thing...

- vantagepoint meet crossware at the IBM forum in 2003!

