

## EXECUTIVE QUESTION AND ANSWER

Presented by InnoVeer Solutions and QAS Limited

**AH:** How did QAS begin its CRM initiatives?

**IH:** QAS had an older CRM system that supported and aided our sales team and managed our customer orders, but it was not flexible and somewhat limited in terms of functionality. As a result, it could not support the growth of our sales, marketing, or business development programs going forward or scale with our business ambition to be a leading international player within our fast-paced, evolving industry.

After analyzing our business needs, we realized that our company required a single, flexible customer relationship management (CRM) system that could better support our rapidly-growing business and expansion efforts, while also easily integrating with our other applications.

**AH:** What was your implementation approach to CRM?

**IH:** We examined our current sales, service, marketing, and finance processes and identified key metrics that we wanted to track through CRM. We then created a data model, a data dictionary, and a business process map. The ultimate goal was to ensure that all crucial data was easily accessible from one central location.

Following this, we asked sales, marketing, service, and finance team members to participate in cross departmental workshops. This enabled us to accurately capture the needs of each department and understand what information to integrate into the system as a whole, followed by implementation.

**AH:** What business outcomes have you witnessed as a result of your implementation?

**IH:** We now have the ability to support all international expansion



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efforts and business changes throughout the organization. We have a more coherent and uniform CRM system, including a solid architecture that provides clear information in a user-friendly environment. Our teams have access to all customer data, and our customer-facing employees are able to use the information to better service and sell to our customers. For example, our sales pipeline is now managed through a single system, allowing us to integrate data from all departments and ensure end-to-end visibility.

**AH:** How do your marketing and renewal teams use the system to improve overall effectiveness?

**IH:** Our marketing team is using our CRM system to record all lead-generation activities, as well as track the overall success and results of our campaigns. We are able to view all campaigns and track them against various opportunities, managing the lead sources throughout the process.

During our analysis, we had determined that because a significant part of our revenue stems from selling annual licenses, integration of our order management and sales processes was critical to our CRM program development. For us, processing an order produces the next opportunity, so this means that sales and order entry must be closely tied together. We are now able to understand our renewed revenue retention. On top of that, our finance and technical teams now view the same information in the same place and in the same way.

**AH:** Do you have any future plans for expanding your current CRM capabilities?

**IH:** Right now, we are looking to expand our marketing functionality and build a business case for business intelligence. Moreover, we are continuing to focus on our information management, and would like to begin examining how we can better support our management team by further using our system to improve overall decision-making and better understand our prospects' and customers' needs.

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## AH: Do you have any advice for high-technology companies looking to further invest in CRM?

IH: It is critical to have a complete user adoption strategy, including continual system updates and improvements, and fixing of any bugs as quickly as possible. This not only “cleans” the system, but it also psychologically demonstrates to users that they cannot simply say “it doesn’t work.” It is important to begin training early, so that the system does not seem too overwhelming or complicated, and to ensure that users do not pick up common mistakes. This is especially important with new hires, as someone new is always inundated with knowledge and training, so you have to make it as simple as possible.

It is also crucial for the entire organization to “buy into” the CRM program and understand the value it can offer everyone, from executives to sales and marketing to service and IT. The main focus should not be technical, but rather business-oriented, as CRM programs should attempt to help improve the overall business at the highest-level.

### ABOUT INNOVEER SOLUTIONS

INNOVEER SOLUTIONS, an award-winning customer strategy and solutions consultancy, provides advanced customer management services to high-technology and healthcare companies, among others, in the areas of planning and strategy, technology implementation, and optimization. The company’s deep industry knowledge, broad technical skills, and Multi-shore Methodology enable organizations to address their critical customer-facing issues and achieve an integrated view of all customer information. With an exclusive focus on customer management since 1998, Innoveer has worked with more than 300 organizations to increase their overall business growth, improve internal efficiency, and enhance the customer experience.

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### ABOUT QAS LIMITED

Experian’s Data Integrity experts, QAS, provide contact data management (CDM) software and services that help organisations drive value from their data. Every organisation stores contact information on its customers/citizens, prospects, suppliers and employees. Over 10,000 organisations worldwide choose QAS products and services to manage the quality and accuracy of this data to improve business processing, financial performance, efficiency and the customer experience.

