Master's thesis
The consequences of implementing a CRM system within an organization (study case)

Supervisor :
Prof. dr. Koenraad VANHOOF

Andreea Dumitrascu
Thesis presented in fulfillment of the requirements for the degree of Master of Management

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I would also like to express my thanks to the company that allowed me to conduct the study case and also to the interviews participants for their support and patience as without their participation the study case could not have been conducted.

I also express my gratitude for everyone who directly or indirectly helped me to succeed in writing the present thesis.

Summary

This thesis is focusing on the consequences of implementing a Customer Relationship Management system within an organization. The main purpose is to demonstrate how important CRM system is for an organization in order to improve customer service and automate the processes. Consequently, this may have an impact on the overall business performance. As nowadays the technology is evolving rapidly, it is getting harder for companies to reach a high place in this competitive market. Many companies are switching from spreadsheets to IT systems so the core idea of the thesis is to highlight the way this fact is affecting the organisation. A major number of studies that had been carried on have discovered that a strong link exists between CRM implementation and business improvement (Coltman et al., 2010). To be able to capture this, I have chosen to illustrate a real-life business case, emphasising the changes that Customer Relationship Management had brought within the organization. After considering the literature, it seems that organizations can use this system to improve customer service, improve its processes and automatically this will reflect on the business performance. By analysing the employee's perspectives and the data from the system, this paper's study case led to a similar perspective; however, some valuable new insights are captured.

The present paper has the following main research question: "**What are the consequences of implementing a CRM system within an organization**?" and is divided into four chapters, each chapter being relevant for covering different aspects within the chosen field from both a theoretical and practical perspective.

Chapter 1 is drawing the big picture of my research topic, setting up the roots for the study case. It emphasizes how important Customer Relation Management is nowadays, especially in the evolving today's market where all the companies want to achieve success and remain competitive. The chapter includes the main research question and the reasons behind it; therefore, the chosen sub-questions will be significantly helpful for providing the answer to the principal one. Moreover, the

research methodology part will synthesize the methods used to be able to conduct the study case and reach the findings.

Chapter 2 includes a theoretical framework, explaining CRM definitions based on different books and articles. It is relevant to mention that as greater is the knowledge about this IT system, the greater will be the capacity to understand the way it can affect the business. This chapter is pointing up the fact that CRM is often associated with improvement of business, depicting the consequences of CRM usage nowadays from the perspective of different authors. In addition, this chapter is focusing on Microsoft Dynamics and how an organization can create value by using it, its advantages and impact on the performance. The scientific articles used were helpful in explaining the CRM effects from a hypothetic view.

Chapter 3 covers the case study that I have conducted, highlighting the empirical research. With other words, in this chapter I included my analysis of the RICS organization with a specific emphasis on the impact that Customer Relationship Management has on the organization's business. I am focusing on the impact of Microsoft Dynamics software within the business performance, starting from the fact that CRM system was implemented to facilitate the overall business processes, automating them, and improving customer service. The interviews that were conducted within the organization generated a variety of interesting insights regarding our topic. Moreover, the analysis of the gathered data captures the differences between employee's beliefs and the figures.

Chapter 4 has a significant role in illustrating the conclusions and improvements; moreover, this chapter is focusing also on some recommendations that can be used considering a future research in this field. The limitations of the present study are also exposed in this final chapter

Overall, by comparing the theory with a real business case, new interesting insights are discovered that will demonstrate how important is the customization when implementing a new system; the study case will highlight the fact that although

some aspects could be generalized, the opinions may vary and every company has a different story when speaking about a CRM implementation and tool usage.

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Chapter 1

1.1. Introduction

The implementation of Customer Relationship Management is a subject of major concern nowadays and more companies are speaking about IT investment as the key to success. It is believed that CRM has the capacity to bring together in the same place both *technology* and *people* (Coltman et al., 2010). There are several studies carried on this topic; many companies and organizations are opting for a CRM system to have a good position in the competitive market because businesses nowadays are facing challenges due to disruptive technology. As the number of organizations which are implementing Customer Relationship Management is tremendously growing, the main intention of this paper is to underline the effects of the CRM adoption on the overall business. The increase in the adoption is an important fact that has been widely debated by a high number of researchers, which tried to find out what exactly is this software bringing to the business in the context of a permanently changing environment. Customer Relationship Management represents a key system in today's market as the firms can increase the profit by building successful long term relationships with its customers. Nowadays all businesses, from SME's to large multinational organization, should be able to find the perfect solution to survive in this competitive market and to demonstrate the best way of satisfying the needs of its targeted customers (Gerhard et al., 2016). Taking into consideration the increasing competition, a high number of firms use CRM as a main provider for several benefits like improving business intelligence, a way of taking better decisions and of course enhancing customer relations and higher quality of the services (Tae et al., 2005). As customer demands need to be taken into consideration, CRM has become an important priority for companies (Abbas et al, 2008). As the markets are extremely saturated nowadays, in order to survive and achieve success, the companies need to focus more on a customer oriented strategies, which will help them reach their goals (Heinrich, 2005). Usually when firms are opting for a Customer Relationship Management system, the expectations are high, hoping to obtain many benefits including increased revenue and customer's

loyalty (Tae et al., 2005). Offering the right solution to the customer at the proper time is believed to be a victorious philosophy these days. Success equals to customer knowledge; these factors will automatically lead to a successful CRM implementation (Gerhard et al., 2016).

Through the thesis, the main results of Customer Relationship Management implementation as shown up in the literature are reviewed. As Mathias et al. 2005 mentioned in his study, CRM applications are improving the customer satisfaction. It is believed that a satisfied employee will also lead to a satisfied customer (Gerhard et al., 2016), so, it will be interesting to discover the way the employees perceive CRM, if they are happy with using it and if this is affecting their Key Performance Indicators. Moreover, another interesting aspect of CRM is the process fit which is considered to be by Roh (2005) an important initiative that plays a role in organization's performance. Besides the above, this thesis will highlight the reasons why the organization choose to implement CRM, in this way testing if the rational motives are the same as the ones described by the literature.

To sum up, we could say that CRM is running a philosophy where the customer is in the centre of the action; as a matter in fact the goal becomes to gain long term and profitable relationships with the customers (Gerhard et al., 2016). This research is focusing on showing if the above philosophy is applying in a specific organization, analysing if the adoption of this system really helped in the business improvement and firm's success.

As the decision of investing in a new technology is not always very easy to take and implies high investments, is important to know what the results of the implementation are. During this research, I found out the main effects that Customer Relationship Management has on a specific organization, the study case capturing the main consequences of the usage from both employee's perspective and data gathering.

1.2. Research questions

Main research question and sub-questions

As CRM adoption is a subject of extreme actuality in the context of Information Technology, the main objective of this research is to establish what are the consequences of Customer Relationship Management usage and how is CRM increasing the business performance. From my perspective, it would be worth to find out if the companies should go on investing in CRM technology and if this has a direct effect on the business or not. Therefore, the main research question of the thesis is: '**what are the consequences of implementing a CRM system within an organization**?'' For being able to respond at the main question, I formulated a couple of sub-questions that will give better insights regards to this topic. The sub-questions are

- What is Customer Relationship Management from the employee's perspective?
- What is the purpose of Customer Relationship Management adoption and which are the expectations?
- How do the employees interpret CRM and to what extend is this software affecting their Key Performance Indicators?
- What role is CRM playing in automating the organization's business processes?
- How is CRM affecting the customer service?

The answer to the above questions will be given by using both literature and company's insights therefore the paper will test if a real case fits the theory. On the other hand, the paper is not focusing on the technical aspects of the CRM tool, programming – writing codes, error reports of CRM. In addition to this, the paper is not including the costs of implementation and costs per user as the company prefers to keep this information confidential. Moreover, the paper will not underline the technicalities that were encountered during the actual implementation and the issues with which the technology team was confronted.

1.3. Research method

The present part is underlying the way the research was conducted. To be able to answer the research questions, in the first part of the research I focused on literature review where I included a comprehensive framework with regards to CRM global perspective. The analysed concepts from the literature are helpful in creating the scene for the study case by offering useful theoretical insights. For this I used several articles, books, company's documents, newspapers, CRM webinars and the UHasselt platform called EBooks where I found some interesting papers related to this field.

In the present thesis, I conducted a qualitative research, using primary data. As the purpose of the study case was to determine the consequences of CRM implementation in a specific organization, the most appropriate would be to collect the primary data through interviews, as the thesis wants to obtain valuable insights in judgments, opinions of the organization's employees. These interviews were very helpful in providing deeper comprehension of the phenomena. Regarding the qualitative research, the thesis focuses on non-standardized, semi-structured – face to face individual interviews and the explanation for this was the goal of collecting the answers from the established list of questions but in the same time to remain flexible as several explanatory questions may be added if needed. The sample was chosen in a systematic manner; the employees selected for the interviews have relevant tasks, working with Customer Relationship Management- Microsoft Dynamics daily and being able to assist the capacity of the software by having sufficient capability to answer the interview questions. For the study, I opted for quota sampling instead of random one; in this way, the study could put sufficient focus on heterogeneity.

The following respondents were interviewed, as mention in Table 1.

Function	Place	Department
CRM Program Manager	UK	IT Department
Application Consultant	UK	IT Department
Customer Service Executive	UK	Customer Service
Customer Service Executive	Belgium	Customer Service
Customer Service Executive	UK	Customer Service
Customer Service Support	UK	Customer Service
Customer Service Support	UK	Customer Service
Customer Service Support	UK	Customer Service
Customer Service Executive	UK	Customer Service
Market Data Analyst	UK	Marketing Team
Sales Coordinator	UK	Sales team
Sales Coordinator	UK	Sales team
Sales Coordinator	UK	Sales team
Sales Coordinator	UK	Sales Team
Sales Coordinator	UK	Sales Team

Sales Coordinator	UK	Sales Team
Business Intelligence Analyst	UK	BI
Business Intelligence Analyst	UK	BI
Business Support Executive	Brussels	Regulation Team
Regulation Officer	UK	Regulation Team
Regulation Officer	UK	Regulation Team
Regulation Officer	UK	Regulation team
Marketing Analyst	UK	Marketing Team
Marketing Analyst	UK	Marketing Team
Marketing Analyst	UK	Marketing Team

Table 1.1 - Overview of interviewees

The interview itself contains fourteen open questions and captures the essential effects of the CRM usage on a specific organization. All the questions are relevant to the topic and addressed to key people that oversee the matter (25 employees in total). Speaking about the confidentiality during the interview itself, is important to mention that before proceeding, I gave a consent form to the employees, explaining the purpose of the research and other confidentiality terms. Moreover, the employees had the right to interrupt the interview at any moment. To be sure that there is no misinterpretation of the questions and the information is accurate all the answers

were carefully double checked with the interviewee. All the received information was used only for writing the present paper.

Apart from the individual interviews, it is very important to mention that the knowledge obtained straight from the organization, which is my workplace, plays a significant role when speaking about qualitative research. As a matter in fact the observations were another main qualitative research method used in this thesis, a very significant one if we think that I had the opportunity to watch attentively every day what is the impact of CRM usage on RICS organization, the insights of the employees and senior managers.

Moreover, as a secondary data, I used a list which was already created by the company to discover the reasons behind using CRM functions in most departments. The list gives valuable insights with regards to the way CRM solution can have an impact on the business, explaining also what exactly the system can bring for better service; 95 employees were asked their options regards to what they would like to have on CRM and which will be the effect of using it. This is shedding light on the actual purpose of the CRM functions and their role within specific units.

To summarize, by working in the analysed organization and using Customer Relationship Management – Microsoft Dynamics daily, I could notice if the theoretical aspects are really applying when speaking about a business case situation, by capturing valuable insights from different departments.

Chapter 2

2.1. Short history

The concept of "customer relationship" has its roots in the past when Drucker mentioned in 1954 that the customer is representing the "very reason for an organization existence" (Drucker, 1954). Moreover, he underlined the fact that the customer is viewed as the foundation of an organization, playing a major role in the improvement of business. (Drucker, 1954) The customer requirements have become extremely important nowadays, the society being characterized by rapid changes and technology innovation, so firms need to constantly adapt to remain competitive in the market and satisfy the customer's needs. In addition to this, customer's expectations are growing bigger and, on top of that, we need to consider that customers are making part of digital generation used with different new types of technologies (David, 2014). Therefore, the technology factor is essential when speaking about customer relationship development, because the constant change within the network infrastructure is bringing new better solutions. Bharadwaj (2000) is affirming in his study that IT is a primordial factor when it comes to customer orientation.

As a business strategy, Customer Relationship Management appeared in the 90's, being based on a technological solution that was focusing on the collection of valuable information linked to customer relations. (David, 2014) At that time, in the middle of the technology era, most companies were investing lots of money in these applications with the scope of attracting the customers and increasing the profitability. As a matter in fact, the theory behind CRM sounded extremely attractive, so, the software had a huge success since the moment it was launched on the market; unfortunately, it did not manage to meet the expectations of every company that implemented it (Turk, 2004) and it is believed that one of the reasons is the lack of CRM understanding, by considering it only a simple technology (Screenivasan et al., 2010). Focusing only on the technology aspect, they significantly reduced the importance of the strategic value that CRM can deliver and did not give sufficient

importance to new processes and collaborations (Turk, 2004). The success of CRM leads in having strong business gains and a strategically approach (Turk, 2004).

As the time is passing, we notice that the interest in CRM continuously grows and the software itself to improve by developing new strategies that are helping the companies to integrate customer information. In the last five years, the CRM market improved significantly, "Oracle building its customer experience portfolio primarily by acquisition; SAP, like Oracle, aims to support end-to end customer experiences" (Forrester, 2016)

However, even if the interest in CRM is so high, there is no real agreement with regards to what CRM represent (Adrian and Pennie, 2005).

2.2 Understanding CRM

To have a good overall picture of the topic, the definition of Customer Relationship Management System plays a major role, especially when establishing the answer to the first sub-question – What exactly is Customer Relationship Management?

As Shaw mentioned, there is no established definition of CRM; however, several authors tried to explain the concept and create an agreed answer. (Shaw, 2001) The explanations are varying from author to author, so, the lack of an agreed description may affect the organization viewpoints on CRM (Adrian and Pennie, 2005). Jorge mentioned that CRM may be defined as an "integrated management system" which has the customer in the centre (Jorge, 2012). To make it simple, Customer Relationship Management is the solution that offers a 360 approach to the one that buys a company's products or services (Jorge, 2012). Kumar and Werner (2012) have a similar way of defining CRM – the software that has the capability to analyse databases to maximize the period of customer loyalty. Ables et al (2011) give an interesting definition to CRM: the software that is capturing the data, analysing it, to get a better insight regarding prospects, and tracking the outcome for further improvements. In the same time, CRM can be defined as the system that reminds every organization with whom they are speaking to and helps building relationships

that focus on mutual trust with both present and potential customers (Monika, 2008). Reinartz (2004) is viewing CRM as a process containing three stages: "customer initiation, customer maintenance and customer termination" with the role of adding value to the relationship portfolio. Forrester 2016 defines CRM as: "The business processes and supporting technologies that support the key activities of targeting, acquiring, retaining, understanding, and collaborating with customers."

From Turk's (2004) perspective, Customer Relationship Management integrates a mix of business approaches together with technology to help companies to build durable and profitable relationships with customers. Per Injazz and Karen (2003), CRM represents a mix of "people, processes and technology" with the main purpose of becoming aware of the company's customer needs and building beneficial relationships for both client and firm. The same authors are affirming that CRM systems are using the advantage of the permanent technology innovation, by having the ability to conceptualize the customer behaviour and automatically deliver quality products and services (Injazz and Karen 2003). With other words, the technology is facilitating the process of tracking the customer's behaviour and using it in the future for a better experience. Coming back to the ''people, process and technology'', the integration of the mentioned three dimensions, as in figure 1, is essential for a successful Customer Relationship Management implementation and performance enhancing.
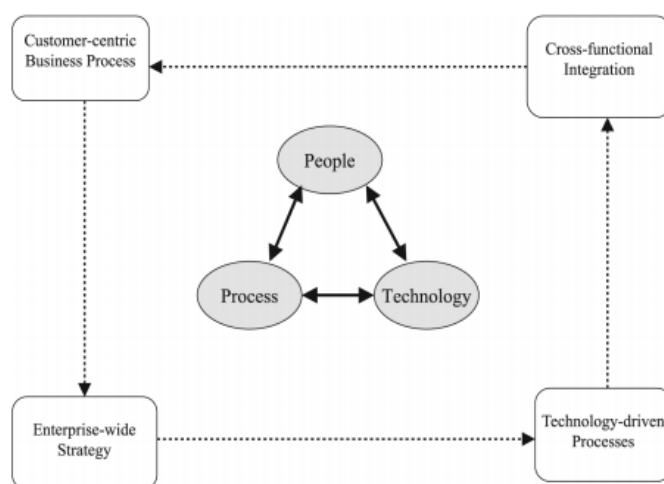
Figure 2.1 – Successful CRM implementation Injazz and Karen (2003)

CRM is creating value by establishing relationships with the customers. Turk et al (2000) is explaining that CRM can bring significant improvements if it is approached in a strategical manner. As a matter in fact, the organizations should view CRM as a way of creating value and not only as an implementation of a simple IT system. The bellow figure shows the relevance of defining CRM in a strategic way.
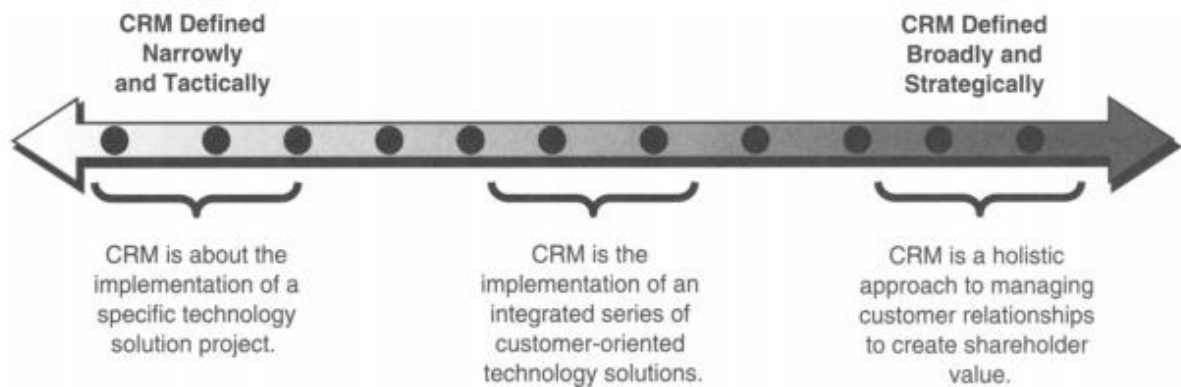
Figure 2.2 – CRM definitions (Adrian and Pennie, 2005)

Trying to give a proper definition while creating a balance, Turk is affirming that CRM represents a mix of:

- Business approaches that have the role to improve customer operations and
- Technologies that are trying to automate the mentioned operations. (Turk et al., 2004)

Swift (2000) is sustaining that every organization should adopt a relevant explanation which is consistent enough for them and this is agreed by Forrester (2016) which is affirming that the CRM should be adapted to the company's needs as in the figure 3.

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Category	Consider your requirements to support
Sales force automation	• Management of complex, parallel sales processes, including quote-to-order and renewals • Complex team, territory, and commissions management processes • Prescriptive advice to increase sales productivity
Marketing automation	• Marketing resource management needs • Complex, multistage, and recurring campaigns • Complex lead-management workflows • Online and offline communication channels • Offer management, including analytics to optimize offers
Customer service	• Computer telephony integration • Case management • Omnichannel communications • Agent guidance for scripted processes • Knowledge management for agents and customers
Field service	• Core field service needs (dispatch, scheduling, service order management) • Spare parts management • Warranty management • Mobile support for field employees
eCommerce	• Transactional features (shopping cart, search, promotions, personalization) • Order management • Returns/exchanges
Business intelligence	• Reports and dashboards • Advanced analytics capabilities, including predictive modeling, simulations, and statistical analysis

Figure 2.3 – Right size your CRM for your needs (Forrester, 2016)

2.3. CRM and customer service

It is noticeable from summarizing all the above definitions, the purpose of implementing CRM is strongly linked to the creation of durable relationships with customers and construction of mutual trust.
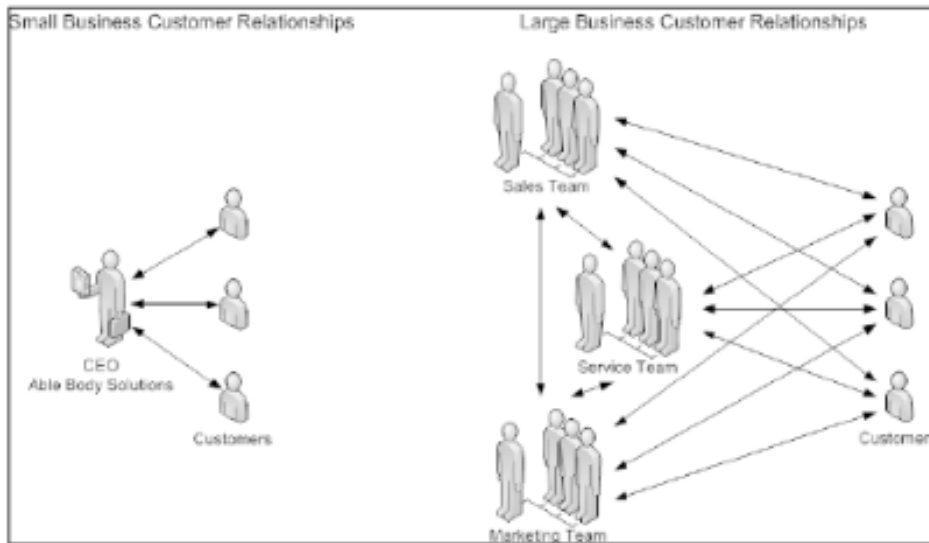
Figure 2.4 – The complexities of managing customer interactions (Ables et al., 2011)

Dutu and Halmajan (2010) are highlighting the fact that most companies are using CRM for creating and maintaining good relationships with the customers. All the author's explanations are similar from this perspective, underlying the fact that CRM puts accent on the customer needs by placing the client in the middle of the action. The literature is highlighting the power of CRM on improving customer service because the system was built to centralize the customer information. Mithas et al (2005) is showing is his research that CRM is contributing on the customer's knowledge improvement and as a matter in fact also on the customer satisfaction. First, customers will be more satisfied because CRM has the capability to build stronger relationships with them (Turk et al., 2004). In the same time, by having the capability to do data mining, CRM is improving the company's possibility to comprehend the customer behaviour and adapt the services and products based on this (Abdul et al, 2014). According to Dutu and Halmajan (2010), CRM has a positive effect when speaking about customer satisfaction and retention; their findings are showing that ultimately this will impact company's success and business performance. Similar to this, Reinartz (2004) discovered that looking at CRM as a process of initiating and maintaining relationships with customers will increase the market share of the company and grow the profitability.

Gerhard et al (2016) is showing in his recent book called "Customer Relationship Management" the most relevant stages of CRM that links customer service with the company's overall success:

- "Customer Orientation" – That is the stage when the company is putting accent on customer's needs, analysing the market and the competitors
- "Product quality" – This part is underlying the power of incorporating the customer wishes into the final product to obtain quality services/products
- "Customer Satisfaction" – By the time a customer will finish with using the product/service, they will be either satisfied or not with the outcome; in case the answer is positive they will tend to choose the product/service in the future and make further recommendation to other people;
- "Customer Retention" – If the customer is satisfied, the probability to come back to the same company is increasing; therefore, the company will retain the clientele by building long-term relationships. Reichheld (1996) explained in his study that retaining a client involves less costs comparing to the process of attracting new ones
- "Customer Value" - "Company Success" – The profit is directly proportional with the number of customers which are committed to the company and the success of the company stands in the profitability; moreover, according to Reinartz et al (2005) CRM is positively associated to organizational performance which is related to company's success.
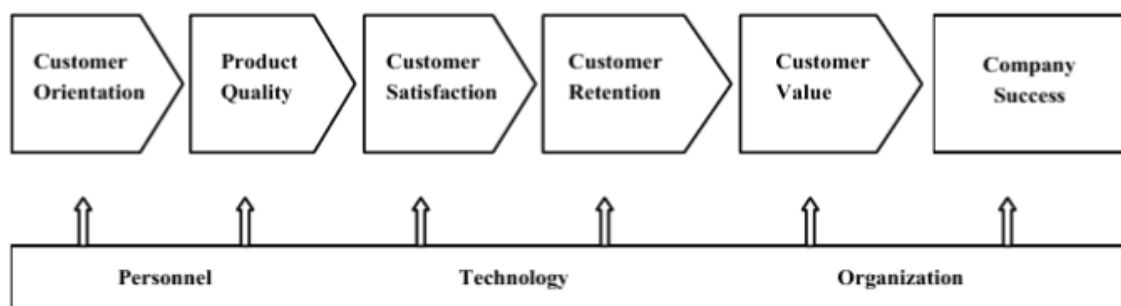
Figure 2.5 – Stages in CRM (Gerard et al., 2016)

Gerard et al (2016) is creating a link between the employee's satisfaction and the customer satisfaction, the first category influencing the second and both the needs of the customer and employee are equally important when speaking about the overall success. On top of that, he is highlighting the fact that if a customer is satisfied, he will come back to buy from the same company, so, ultimately this has an impact on company's overall success. Coulter (2002) is also affirming in his study that the employee's attitude has a crucial role when speaking about customer satisfaction.

Choi et al (2013) are showing in their article that CRM has four important elements and they analysed which one of these has the most significant impact on customer satisfaction and customer loyalty:

- Interaction Management (the way the enterprise is interacting with the customer)
- Relationship Development (the way the enterprise can develop long-term relationships with customers)
- Quality of Service (is the product that the company is offering characterized by quality?)
- Behaviour of the employees (the way the employees are acting with the customers)
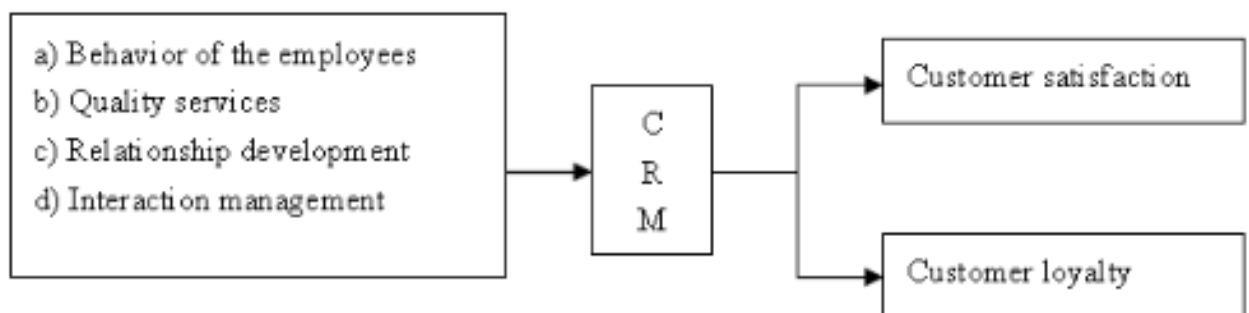
Figure 2.6 – Conceptual framework (Choi et al., 2013)

The findings of the above study are underlying the fact that the behaviour of the employees is playing the most significant role when speaking about customer satisfaction and loyalty. (Choi et al., 2013)

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CRM Elements	B	Significant
Behavior of the employees	.575	.000
Quality of services and products	.143	.099
Relationship development	.032	.565
Interaction management	-.045	.329

Table 2.1 – CRM Elements (Choi et al., 2013)

Roh et al (2005) is creating a similar link in his article, affirming that the CRM components are impacting the employee's efficiency; this will significantly affect the customer satisfaction that will impact the firm performance. According to Anderson et al (1997) companies which are recording a major level of customer satisfaction will also have a better figure in terms of profitability.
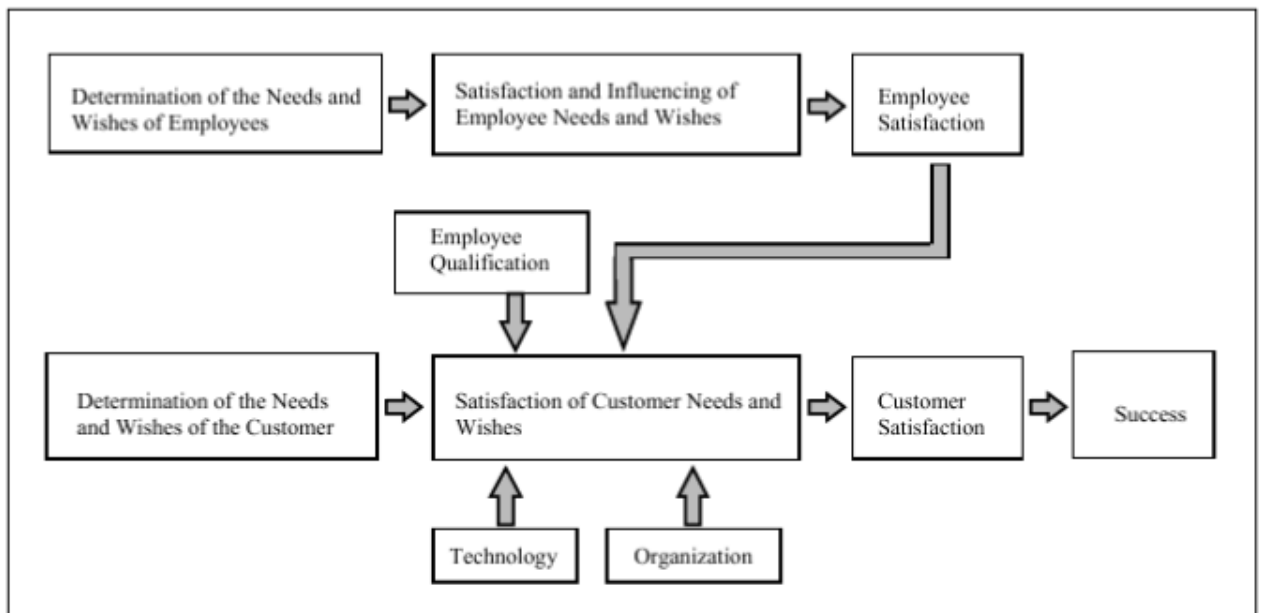
Figure 2.7 – Factors influencing customer satisfaction (Gerard et al., 2016)

CRM is affecting employees and clients in the same time, the "people" aspect of CRM being extremely significant; as an effect, the system is promising improvement on both sides (Tae, 2005).

2.3.1. The way CRM is affecting the employees

The employees are crucial when speaking about customer service; CRM is adding all the customer service skills into the company's employees, providing them with all the necessary tools that can serve in delivering the best service. Lee et al (2011) shows in his book that the employees will perform better using CRM, as they will have the ability:

- to track all the activities
- to set up fixed deadlines in the system
- to assign tasks to colleagues
- to save time by having all the data in one place
- to organize better their work by having an overview of all the activities
- to track call hour/duration with a customer
- to customize and automate the business processes for a better flow
- to integrate Outlook, Excel, Word. (Lee et al., 2011)

Having access to the entire customer's information, it is easier to handle different type of queries, while delivering the best service. The 360 approach is facilitating the process of building authentic engagement with the client. Richard and Jones (2008) are mentioning that CRM is improving the ability of targeting the most profitable customers, facilitating the job of the employees.

As the literature is affirming that there is a linkage between CRM and the way employees are performing (Lee et al., 2011), I would like to define the way performance can be measured. David (2010) is affirming that by using Key Performance Indicators, an organization can measure organizational performance in the best way. A Key Performance Indicator represents a measure that may be quantified for further performance comparison in terms of achieving specific goals and objectives. Every department has its own KPI's which are crucial for the whole organization to function properly. The Key Performance Indicators have a role in evaluating the success of an organization's output. To sum it up, accordingly to Lee

et al, CRM plays a crucial role in the employee's performance, helping them to meet their KPI's (Lee et al., 2011).

2.4. CRM and business processes

2.4.1. Business process definition

Berman (2014) is defining a process by a set of activities which are helping you to get from the present point to the point you want to arrive at. A business process may be defined by "transforming an input into a valuable output for an internal or external customer." (BPM, 2016) A business process has the capability to add value for the customer, serving his needs.

To have a better overview, it is helpful to explain the concepts of "input" and "output":

- The Input is representing what the company already has; the input is used in order to obtain the result;
- The Output is representing what the company wants to deliver to the client, the final product;
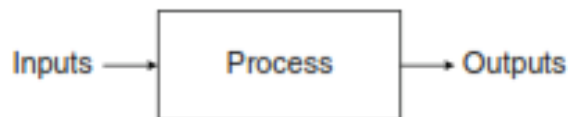
Figure 2.8 – Business process overview

2.4.2. CRM- Processes automation

CRM processes are considered by Payne and Frow (2005) to be all the processes happening between a firm and its customers. Moreover, Roh et al (2005) considers process fit to be an important CRM initiative that is positively affecting the company's performance. Customer Relationship Management system has a crucial role in the process automation, reducing drastically the number of manual workflows. It is shown that this will cut costs and increase the sales within the firm. Users can keep track of the steps that have been taken to complete the process by using the

"process flow" bars option. This possibility is providing a useful overview of the process.

Figure 2.9 – Business Process Automation

Below are some examples of how CRM is automating the processes:

- There is no need to generate the invoices manually as this becomes automated
- The process of recurring payments is automated
- The reports are generated automatically from the system so there is no need for manual work
- There are automated e-mails that are going from the system when needed (e.g.: notifications for managers in case new opportunities are discovered, automated e-mails to customers informing them when a case has been created/resolved, automated e-mails asking for feedback, etc). CRM has the capability to create personalized e-mails for customers and this is avoiding the composition of individual personalized messages which sometimes may be time consuming
- The scorings are created in an automatic manner using the data from the system to target the leads that are in the pipeline for sales

By automating the processes, Customer Relationship Management is radically increasing the process efficiency and employee's productivity. Consequently, this will bring several benefits to the company, such as minimizing the number of human

errors, reducing the number of human resources and administrative tasks, increasing the speed of the process, reducing costs, increasing the sales and the profit, ensuring more accuracy and preserving the quality of the data.

2.5. Customer Relationship Management Tools

Nowadays in the market there are several CRM tools; so, companies are free to choose the most suitable one. Currently the most used tools are the following:

- Salesforce.com CRM
- SAP AG
- Oracle
- Microsoft Dynamics

The companies which are selling these tools are the very well-known corporations: Salesforce, SAP, Oracle and Microsoft. There are also other providers in the market which are more adequate for small and medium enterprises.

Forrester (2016) is dividing the CRM into four categories as it may be noticed in figure 8: "CRM for large organizations" (more than 1000 employees), "CRM for midsized organizations" (250-999 employees), "CRM for small organizations" (250 employees) and "CRM speciality solutions" (CRM vendors which are specialized in a very specific industry).

Examples of CRM suites for large organizations

> **CRM suites primarily designed for firms with 1,000 employees or more**
> - Infor CRM
> - Microsoft Dynamics CRM*
> - NetSuite
> - Oracle CX
> - Pegasystems CRM
> - Salesforce*
> - SAP CRM
> - SAP Hybris Cloud for Customer
> - SugarCRM*

Examples of CRM suites for midsize organizations

> **CRM suites primarily designed for firms with 250 to 999 employees**
> - Aptean Pivotal CRM
> - bpm'online
> - Bullhorn
> - Infor CRM
> - Maximizer CRM
> - Microsoft Dynamics CRM*
> - NetSuite
> - Oracle CX
> - Sage CRM
> - Salesforce*
> - SAP Hybris Cloud for Customer
> - SugarCRM*

Examples of CRM suites for small organizations

> - Base CRM
> - Capsule CRM
> - GoldMine CRM
> - Infusionsoft
> - Nimble
> - Swiftpage Act
> - Zoho

Examples of CRM specialty solutions

> **Customer service solutions**
> - eGain
> - Freshdesk
> - Verint Systems
> - Zendesk

> **Customer marketing automation solutions**
> - Adobe Campaign
> - IBM Campaign
> - Infor Epiphany Marketing
> - SAS Customer Intelligence
> - Teradata Integrated Marketing Cloud

> **Industry specialist solutions**
> - Amdocs CES Customer Relationship Management (telecommunications)
> - Blackbaud (not-for-profits)
> - IMS Health (life sciences)
> - NexJ Systems (financial services)
> - StayinFront (life sciences)
> - Veeva Systems (life sciences)

Figure 2.10 – CRM Solutions Fall into four distinct categories (Forrester, 2016)

2.5.1. Microsoft Dynamics CRM

Microsoft Dynamics represents a tool of CRM. It is considered to be the leader on CRM solutions as it is easy to integrate with other systems and has a considerable advantage when speaking about innovation, usability and user-friendliness. Trying to define it in a very simple way, Microsoft Dynamics can be explained as a database, the main place where each organization that is using it can enter relevant information about its customers. The technology that is at Microsoft Dynamics base is called .NET, a technology initiated by Microsoft (Lee et al., 2011). Dynamics is promising to the companies to hold significant information that will help in the process of decision making. It gives every "account" (firm) and "contact" (person) a reference number so

it is easier to search in the whole database. Moreover, by providing a tracking option, Microsoft CRM is managing the overall information covering marketing, sales, customer service. One of most interesting features that it brings is related to workflows; in this way, the functions within the company are automated (Lee et al., 2011). It provides the possibility to assign tasks to colleagues, to check the completed activities, on-going ones and this are playing a significant role when programming the business processes. In addition to this, Microsoft Dynamics is providing to users' strong workflow rules that are giving significant consistency to processes (Ables et al., 2011). Microsoft Dynamics has become that flexible so it incorporates several functions which are related to Enterprise Resource Planning Systems (managing processing orders, sending invoices to customers).

Moreover, when speaking about Microsoft Dynamics is really captivating the way it is integrated with Microsoft Office, transforming Outlook in the perfect place for handling the customer information with a user-friendly interface; in the same time, it allows to run Excel reports and mail merge letters using Word templates. Microsoft Dynamics CRM has a huge advantage in the market because people are already familiarized with Office interface and that makes it much more intuitive. (Microsoft, 2016)

Per Ables et al (2011) the basic terminology of Microsoft Dynamics CRM is including the following:

- *Users*: are usually represented by the employees because they are the persons that have the permission to log into the system;
- *Accounts and contacts*: are represented by companies or individuals which are related in way or another with the company (competitors, business partners, vendors, etc.)
- *Customers*: are represented by either a contact or an account; however vice versa is not applying as an account/contact may refer to a prospect, business partner, etc.;

- *Activities and history*: are the processes that a user is planning to undertake; Microsoft Outlook calendar is synchronizing with Dynamics CRM; however, there are several more possibilities in CRM like adding phone calls, documents, etc.

- *Cases*: may be perceived as projects, requests that were assigned to users based on client's requirements. The cases have a specific period, so, they need to be worked on based on that, otherwise the KPI's will be affected; as a consequence, this will help also to measure if the users completed their KPI's and work on improvement for future projects

Speaking about Microsoft Dynamics, Forrester is affirming that:

"*Microsoft catches up in vision and execution.* Microsoft Dynamics CRM provides strong CRM capabilities with high marks from customer references for usability delivered via a robust, scalable, and unified platform. The product offers very strong reporting and analytics with many prescriptive advice scenarios to optimize sales processes, marketing offers, and customer service agent activities."

Figure 2.11 - The core components of Microsoft CRM (Ables et al., 2011)

Overall, as it is noticeable from the above, the CRM theory is vast and it is focusing on maximizing the relationship with the customers by providing a powerful tool that nowadays is almost indispensable for the firm in order to remain competitive in the today's market (Dutu and Halmajan 2010). Summarizing the theoretical aspects - process automation, improved customer service, better performance for employees, integration are the key concepts that CRM is promising to bring, together with its implementation. On top of that, Microsoft Dynamics which is considered to be the CRM leader is the glue that integrates together the entire Office suite, simplifying the work for employees and being characterized by user friendliness.

2.7. Methodology used

The information gathered from different authors concerning CRM key concepts will be used in order to test if the mentioned characteristics are applying in a large organisation which implemented the system Microsoft Dynamics. Therefore, the present thesis will consider the following aspects, with a specific emphasis on the changes that the system brought in the company:

- The role of Microsoft Dynamics within the organisation (expectations, reason behind implementation, short comparison with the old system, benefits, negative aspects, integration)
  - The impact on employee's satisfaction
  - The role within business process automation
  - The impact on customer service

Through this research, the above aspects are reviewed, assessing the contributions of CRM to the overall business by using interviews and data from the organisation. Concerning the expectations and reasons behind the implementation, I used the company's "CRM wish list" where 95 employees provided their input regarding what functions they want and how those functions will help them and the business to work better. The thesis aims to underline also the personal opinion of the CRM users and experts within the company, the questions being designed in a way that the total consequences (positive plus negative) of the implementation & usage are included, as the scope is not only to test if the key concepts are applying, but also to verify if there are any other new relevant aspects. Even if the questions are designed in order to respond to the main question as well as to the sub-questions, they are broad so that that the interviewees may express their opinions without being biased or influenced in any way. In this context, the qualitative analyse includes the below questions:

1. How would you define CRM using your own words?
2. What was the reason behind implementing CRM in RICS?
3. How are the decisions regarding CRM changes taken?

4. What are the facilities that CRM brought to you?

5. Did CRM have only a positive aspect on the business or are there any negative aspects also? If yes, could you please name them?

6. Is CRM impacting your daily performance at work? If yes, in which way?

7. Does CRM have any role when speaking about your Key Performance Indicators?

8. Do you see any linkage between CRM and better business processes? If yes, in which way?

9. Did CRM have any role in automating the business processes?

10. How CRM did affect the customer service?

11. Do you consider that the increase in the customer satisfaction is directly proportional with the usage of CRM? Do you think the customers are more satisfied since you are using CRM?

12. Do you expect an increase in the number of members due to CRM?

13. As of next year, RICS is expected to adopt CRM 2016. What would be the factors behind taking this decision?

14. Do you consider that CRM 2016 would influence the quality of your work?

The interviewees were asked to provide concrete examples in order to sustain their affirmations. The thesis will look into the changes concerning the business processes aiming to underline if there are any differences. In several cases (e.g.: business process automation) figures were provided for making a comparison between the old system and the new one in terms of timing, highlighting the impact on key performance indicators). Moreover, a couple of processes are described as they were before and how they are now.

Overall, the following chapter will include the actual study case, a short overview concerning the company and the effects of CRM implementation and usage.

Chapter 3

Study case – Royal Institution of Chartered Surveyors

3.1. Who is RICS organization and what is RICS doing

Royal Institution of Chartered Surveyors represents an organization operating worldwide: Europe, Middle East and Africa, North America, Latin America, and Asia Pacific. RICS is dealing with professional's accreditation in the following three domains: land in the first place, construction, and property. RICS is taking care of protecting its clients by using a clear code of ethics. In this way, they are "able to provide impartial advices and opinions to its members "(RICS, 2016). This can be summed up as the mission of the Royal Institution of Chartered Surveyors, the organization standing up for setting standards and rules and providing them to the members.

The organizations vision, which was established by the Governing Council, is the following:

"To be recognised in the key worldwide markets as the body that promotes and enforces professional standards and offers access to the most sought-after professional statuses" (RICS, Business Plan 2016) As a matter in fact, they envision a world where everybody within the mentioned sectors – property, land- will comply to the necessary regulation and standards.

3.2. Royal Institution of Chartered Surveyors over the years

The organization has a great history, existing for more than 140 years; it has been dating since 1868 and it was created in the capital of United Kingdom - London. It is characterized by fast development, permanently trying to adapt in order to remain on a high position in the competitive market. As every other organization, they faced many challenges during the years; however, to survive in today's market, they put a strong accent on the communication & relationship with the members, as they knew the key to success is to put the customer on top. The organization has around 125000 members and the number is growing continuously, which is quite impressive

if we think that in 1868 they only had 49 members. Therefore, the customers are crucial for them and that is why they are working hard for the customer service improvement, trying to satisfy the client's needs.

3.3. Technology within Royal Institution of Chartered Surveyors

3.3.1. General aspects

It is very important to mention that the organization is putting a significant accent on technology and information management. As we are currently living in a digital and data driven world, the incremental technology improvements are playing a major role.

Royal Institution of Chartered Surveyors first introduced a version of CRM 4 in 2008/9 that was only used by the Key Accounts Managers and Library teams. CRM went live for Royal Institution of Chartered Surveyors in 2011. Before that, the organization was using a system called MDS as the membership database; it was based on a system called Stratum from APT, but they adapted it quite radically for their purposes, like they have done as well with CRM. Moreover, the organization had a bespoke system built in 2006 when they launched firm regulation. The system was called PRISM and it was used right up until 2013. PRISM was completely built from scratch by the technology team from United Kingdom, Coventry. Royal Institution of Chartered Surveyors started moving into Customer Relationship Management for most of the processes in 2010 but they did not have them all switched across to CRM until the middle of 2013.

3.3.2. The role of Microsoft Dynamics within RICS

In RICS vision, "Microsoft Dynamics CRM (MSCRM) is a Customer Relationship Management system which is used to record and manage individuals (Contacts) and organisations (Accounts) and their associated information, tracking and reporting activities against these." (RICS internal documentation – CRM) Microsoft Dynamics seems to be fully integrated within Royal Institution of Chartered Surveyors systems; as an effect of this, Microsoft Dynamics is replacing all the other forms that exist in

the scope of data capturing. The possibility to integrate it with the Office suite represented a main reason at the implementation moment. Data is a key business asset and if it is well-interpreted and understood, then it will automatically facilitate the process of generating revenue. It is noticeable from the figure 3.1. that CRM plays a crucial role for the organization in analysing the data, which is a valuable output for the business unit, providing important commercial insights.
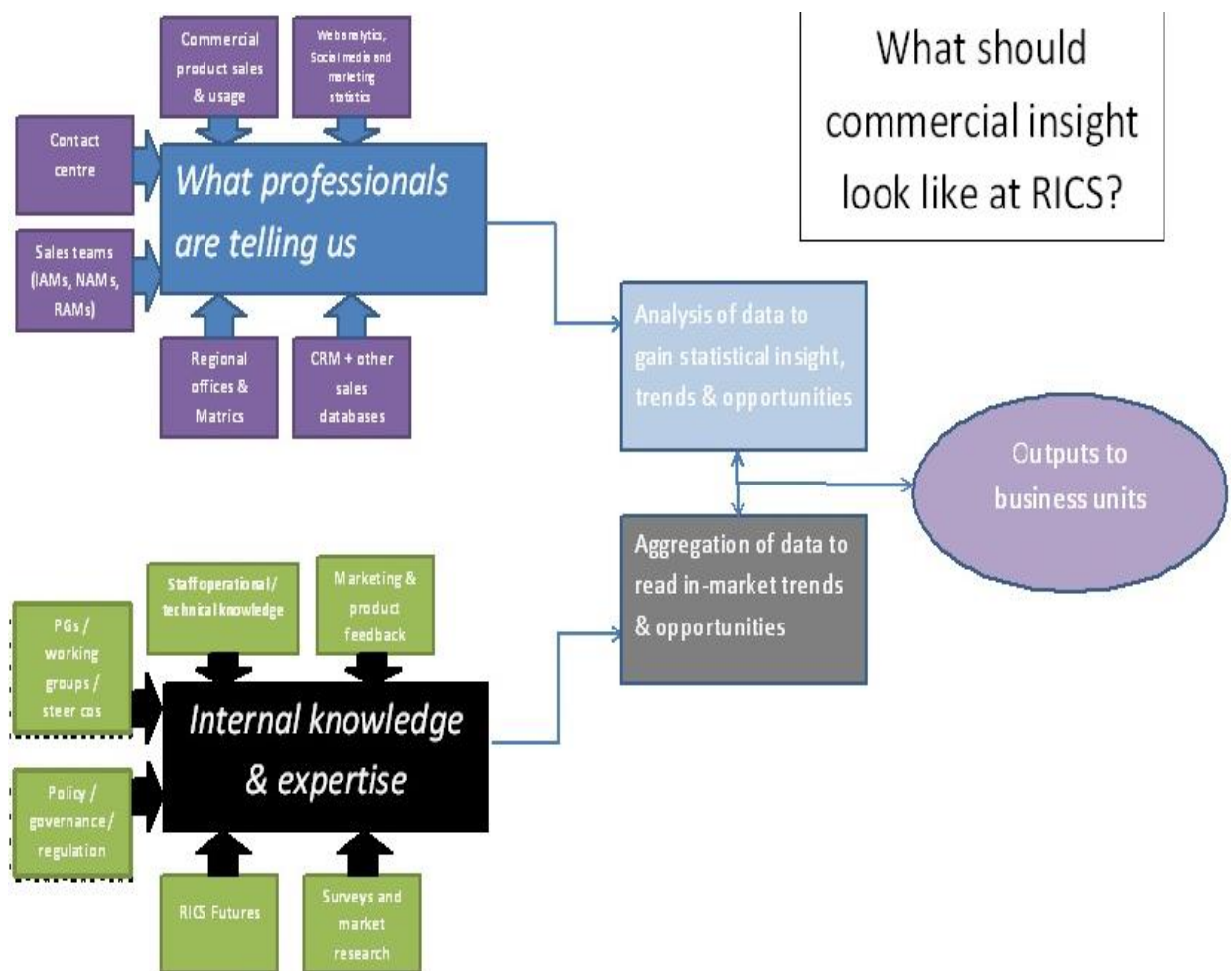

Figure 3.1 – Mapping the Outputs to Business units – Role of CRM (RICS, 2016)

Within the Royal Institution of Chartered Surveyors, Customer Relationship Management it is the core part when it comes to efficiency, being "a software application that provides functionality to manage the relationships and interactions RICS has with its clients. CRM allows RICS to automate its processes so the

organisation can start to focus on value adding interactions with its clients and improve customer service." (RICS –Internal documentation – CRM) Within RICS, Microsoft Dynamics is managing the business to business relationships but also the business to customer relationships, referring to the relationships with those users which are not associated with any company at all. Since Microsoft Dynamics is designed in a flexible way, that fits both a B2C and B2B scenario, the employees may have the opportunity to customize it the way they wish. The application may be accessed by using Microsoft Outlook, or as alternatives the intranet and internet. It is a requirement for everyone in the organization to use CRM consistently, the software being considered an incredible asset.

After taking daily notes based on my activity as an employee at RICS and having a preliminary meeting with an Application Consultant from RICS, it seems that the main purpose of Customer Relationship Management is to provide a common tool for supporting the membership. In addition to this, its core functionality plays a major role into working to a consistent process and adopting the same language within the whole organization. Moreover, the software helps in the action of having complete records of the customer's interaction, so everything is tracked and when somebody wants to go back and check any information about a customer, it is very easily to proceed. Like that, it gets easier to maintain a single view of the data that is also available to all the employees; so basically, everyone can have access to the main information (of course for data protection reason some departments may be unauthorized to see all the data). Another strong purpose of CRM is linked to consistent management information with regards to the work in progress. Therefore, with Customer Relationship Management it is easier to track employee's activities (open activities, closed activities, the manager can be aware of what the team is doing, number of tasks, track of KPI's, etc.). The software simplifies the process of running reports on on-going business, so the employee's tasks are requiring less effort, being able to find all the historical data in the same place. On the other hand, the functionality within Microsoft Dynamics is extremely huge and many of the users will not even need to exploit the full potential of the application. The aim of using

CRM should be to use it enough to be able to fulfil the needs of business and in the same time the needs of the customers.

Since Microsoft Dynamics represents a Customer Relationship Management solution, this is the place where employees may find every RICS member; here is residing the whole RICS database. Microsoft Dynamics is enabling the employees to use complex relationships; a simple example of how a customer is linked to an organization may be seen bellow:
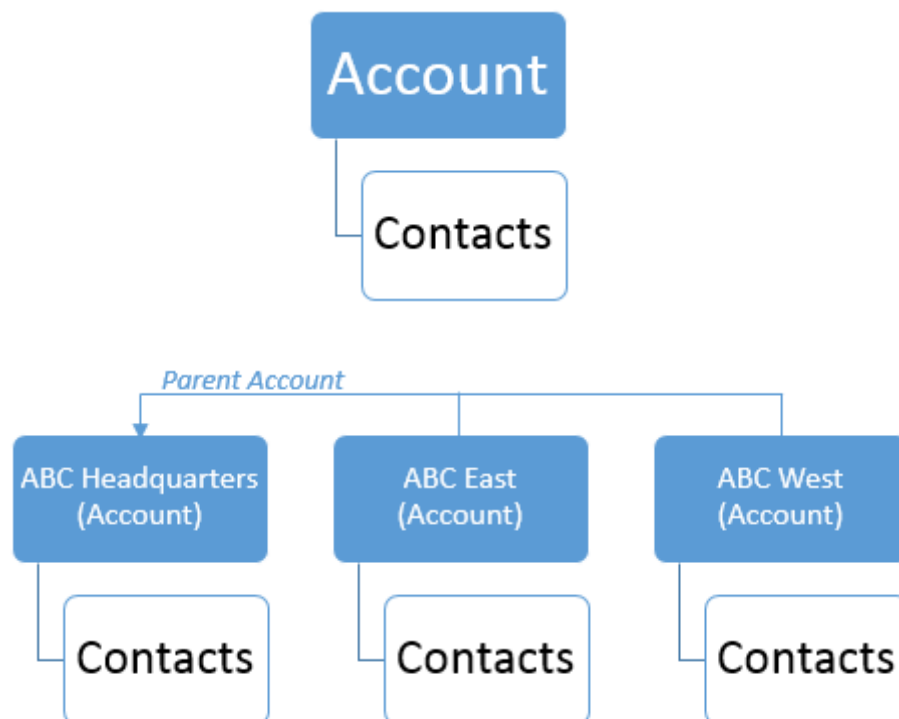
Figure 3.2 – Linkage between accounts and contacts in CRM (RICS, 2015)

As the literature showed us, the accounts are representing companies that the organization (RICS in this case) has a relationship with. The accounts may contain different type of information and not only the customers which are working in that specific company. As a matter in fact, the accounts may include a variety of information like business partners, vendors etc. The relationship type with the

company is customized as a critical step to the success is to distinguish the nature of the relationship with all the firms within the system. Microsoft Dynamics offers the possibility to track additional information, which is useful for every department that is communicating with them (example: an often scenario is when a person from sales is asking for having visibility to the purchase history of every customer- on the other hand this detail becomes necessary as the invoicing becomes integrated from the financial system to Customer Relationship Management).

Another ability of CRM is to discover potential clients, as it may be seen in the bellow figure:

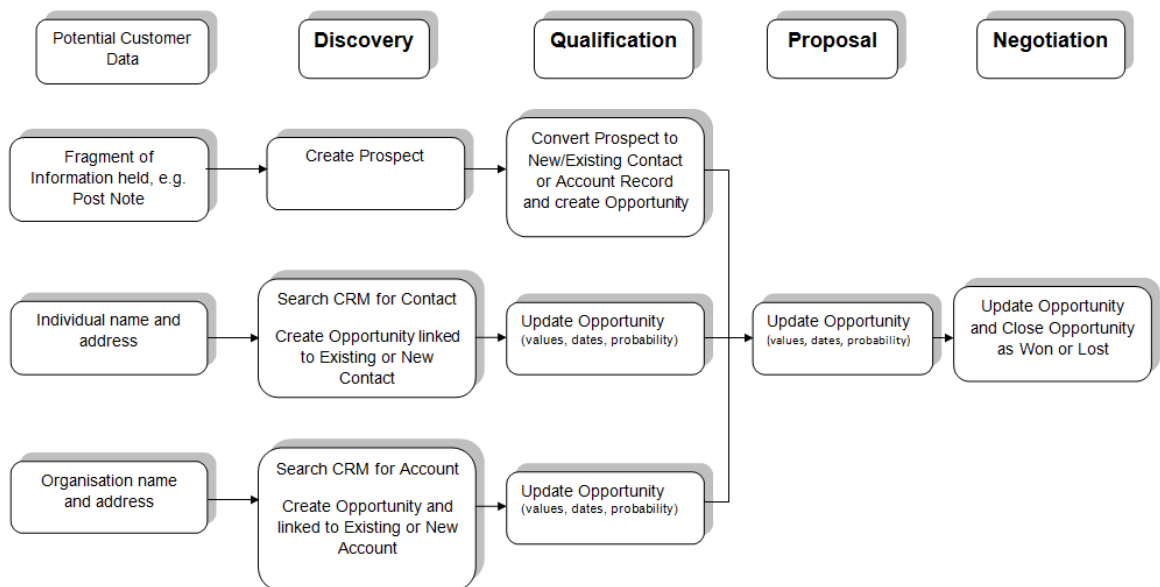*Figure 3.3 – RICS Flowchart – From discovering potential clients to negotiation (RICS, 2015)*

3.4. The impact of Customer Relationship Management within the organization -Findings-

According to our model from literature, CRM is enhancing the business - helping the employees to perform better, improving the customer service and automating the processes. The present analysis generated a variety of interesting new insights into

the effects of using the CRM tool. Therefore, except the mentioned consequences which were found in the literature, the paper encounters new matters that could answer the research question. The following pages will go more in-depth into these aspects and will present the findings of the interviews.

To understand how the employees are perceiving the CRM system, I asked the interviewees to define it with their own words. This explanation gives a clear overview of the actual role of the tool, confirming the affirmations from literature concerning the power of CRM to maintain and develop relationships with the customers. As Jorge (2012) mentioned, Customer Relationship Tool has the customer in the centre, as it can be noticed from the below definitions:

"…Customer relationship management is the main system for maintaining and developing the relationship with any contact. However, the primary focus is always the member (professional) and the firm." (Respondent 1)

"… A useful tool that simplifies employees work in a daily basis by giving them an overview of all the customers historical data." (Respondent 4)

"… A tool that is managing the relationships with the customers" (Respondent 9)

"… Customer relationship management can be defined, as the name says, a tool that manages the relationship with the company's clients." (Respondent 17)

It is noticeable that the definitions of the employees are simple and capturing the essential. For instance, Respondent 6 summarized CRM as *"A tool that keeps together the company and the customers."* All 25 respondents included in their definition the ability of CRM of managing the relationship with customers so keeping the client and company together is an essential role of the system.

3.4.1. Expectations – the reasons behind CRM

An important aspect that needs to be taken into consideration is the reason of implementing CRM and what the employees were expecting when starting using the tool. After discussing with the technology team that implemented CRM, the conclusion was that *"CRM will allow RICS to automate its processes so the organisation can start to focus on value adding interactions with its clients and*

improve customer service" (RICS's technology team, 2015). Regarding my question "What was the reason behind implementing CRM?", the interviewees provided one or more reasons for that as follows:

- The need of better managing the relationship between the customer and RICS – was included 17 times
- The need of a new system as the old one was outdated and didn't have so many functionalities – was included 10 times
- The need of automated business processes – was included 12 times

"…Needed a system to record all contacts so we knew when they qualified, how to bill them and how much. The system replaced an outdated system called MDS (membership database system). It's been developed over the many years to include additional functionality needed by the various departments that deal with our customers." (Respondent 1)

"… The need of a tool that can better manage the interactions between company and customer" (Respondent 5)

Bellow there is an overview table on what the Royal Institution of Chartered Surveyors employees want when comes to Customer Relationship Management (the complete table can be found in Annex 1). Before the implementation, they were asked what CRM can bring to improve the service and increase the performance with regards to their own department. That is a practical use for most of the companies before a system implementation. It is noticeable that even if their requirements are quite different and personalized on their own job, they all have in common the desire to have all the data in one place and being able to track historical actions for getting a better overview of the customer. It is interesting to discover that CRM is useful for both members and non-members, especially for market purposes, identifying new potential clients. As a matter in fact CRM is useful not only for one department but for the whole organization; all the departments from RICS are impacting the interaction with customers and that is confirming what the literature was affirming - the implementation of CRM should have an enterprise-wise mind set (Turk et al., 2004). The Annex 1 is including all the replies from 95 employees on what CRM can bring to

RICS, shedding light on the purpose of using CRM functions. The table from bellow is capturing some of the replies:

"the processes run smoother and frees up time to hit deadlines"
"we can provide better customer service so customers will be more satisfied"
"we can fully track our activity"
"we can manage the sales process effectively"
"we can manage our pipeline and process applications"
"we can see all correspondence"
"we have visibility of members' progress in re-accreditation"
"duplicate debts are avoided"
"enquiries can be handled quicker"
"our ability to support and measure appeals is improved"
"we can email customers from the system"
"we exploit potential opportunities"
"we can provide better service"
"we can seek feedback from candidates & assessors"
"we can communicate with the right people at the right time"
"our ability to support and measure applications is improved"

Table 3.1 – Employee's replies on how CRM can help (RICS, 2016)

According to the above findings, we notice that CRM functions can radically facilitate the employee's tasks, helping them to perform better & faster and to provide better customer service, which is coinciding with the affirmation of Lee et al., 2011.

CRM customization is vital and will help the employees in achieving the above benefits. Obviously, all the employees will want a specific function but the technology team has the role in analysing if that is feasible or not. The decision about the actual functions of the tool and the changes are based on the business needs; for that, a close liaising with the IT department it is crucial.

"…Tend to be project requests based on business need e.g. new events booking functionality. CPD recording etc." (Respondent 1)

"… we've been constantly asked what features do we need so every department it's closely liaising with the IT department for creating the specific changes." (Respondent 6)

Some of the functions from the Annex 1 that will lead to a smoother run of the business as described in Table 2, are illustrated bellow:

"receive e-mails in a library box"
"an automated process to support schemes"
"track all the e-mails"
"to record top-up valuation assessments"
"to reply to a non-primary email without having to change the underlying data"
"upload multiple records at once"
"an automated process to support our PER contact strategy"
"my last 20 Contacts & Accounts to be visible"

Table 3.2 – Employee's replies on how CRM can help – desired functions (RICS, 2016)

3.4.2. CRM benefits and the impact on the employee's performance

As CRM was implemented successfully, after asking the employees further details concerning the facilities that CRM brought to them, I found *"that for a business the reporting functionality gives the information necessary to help make decisions. Each department will use the data in many ways." (Respondent 1)* Concerning my question related to CRM facilities, the interviewees provided one or more benefit as follows:

- The automation of everyday tasks was mentioned 18 times

- The possibility to create efficient reports was mentioned 9 times

- The ability to have an overview of all the contacts was mentioned 15 times

- The ability to integrate Microsoft Dynamics with the Office package was mentioned 7 times

The company measured if the adoption of CRM had any impact on the staff's morale and performance; it was established that the benefit is related to the quality of data being achieved due to CRM platform. The measurement of the achievement was done through questionnaires, as well as from achieving processing of customers' bookings in 48 hours due to CRM; in the past, the process of booking was lasting more than 2 weeks and it was involving lots of administrative work from the employee's side. The stress levels previously caused by looming event deadlines and unreliable systems were reduced. Therefore, the team was not confronting anymore with delays nor backlogs in processing booking in the service team. That lead to the winning of a prize, achieving the title of the best company during an important conference.

"…I consider that CRM helped me a lot with the automation of everyday tasks. This way I can focus more on the efforts of closing the leads and resolving outstanding issues, while CRM takes care of the details." (Respondent 20)

Moreover, from the marketing benefit contribution, CRM is offering a better single view of customers: *"Marketing mailed 12% less delegates in 2015-16 as a result of other activity producing the results needed and this is in part due to the better segmentation we are able to do through CRM." RICS Marketing Team*

"…The system is sending out automatic e-mails when the payment was done so I do not need to send e-mails to each individual" (Respondent 16)

"…The best facility that CRM brought to me is the possibility to access our contacts database easily, even if working remotely, create custom reports that would had been harder to be done through EXCEL and helped me store valuable information about prospective members." (Respondent 21)

This is confirming what Scott and Weiss (2011) where mentioning in their book, CRM being a useful tool for creating dashboards and facilitates the reporting process as all the data is being stored in the same place and this is giving a clear overview of the historical information.

Another positive aspect that was mentioned by the employees that is facilitating their work is related to integration. As Scott and Weiss affirmed, the fact that CRM is integrated with the Office package is a clear advantage. For instance, as it may be noticed from the figure below, an e-mail sent using Outlook can be easily tracked though CRM just by selecting the correct tab named" CRM." That offers users the possibility to choose the type of activity they want to track (e-mail, phone call, appointment) and the type of record (account which is referring to a business partner, contact or lead); the advance find option helps us in the reporting part, by extracting all the data related that specific account/contact/lead. Moreover, CRM itself is including an option that allows the employees to send e-mails directly from the system.
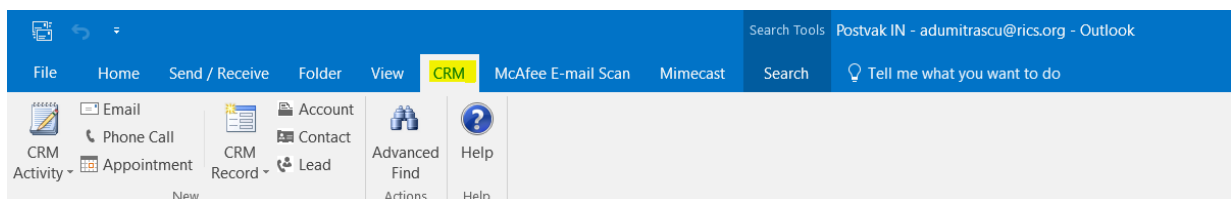

Figure 3.4 – CRM & Outlook integration (RICS, 2017)

As it is clear that CRM had a positive impact on the employees, on the other hand there are also some negative parts that the tool has, including the huge amount of work that was in the beginning as all the data was inserted manually. On top of that, most of the respondents highlighted the fact that when CRM is not functioning properly, it is impossible to continue with their tasks. As a mater in fact, they became dependent on CRM and in case the system is not running properly, they will lose time and they will not be able to move further. Moreover, in case this is happening in a peak season the consequences are even higher as the amount of work increases.

"I think that the amount of work when RICS implemented Microsoft Dynamics was high, as many employees had to manually insert information in the CRM system." (Respondent 20)

"Centralised data management is key to the organisation. However, if the system is unavailable its critical to get back up and working again" (Respondent 1)

"Not enough training when changes are happening can lead to negative aspects, but overall CRM helps us very well in completing our daily tasks. The data is not every time accurate; due to lack of training, there are employees which are creating duplicates in the system and that can become confusing" (Respondent 9)

However, despite the respondent affirmation concerning the data, it is noticeable from the figures that CRM has a positive impact when speaking about data changes, managing to be on top of the target as it can be seen from below: The target was set at 15% reduction but they manage to bring it down at 48% which is an impressive achievement due to the usage CRM and means less administrative work for the employees.

Reduction of data changes	Target:10-15% reduction	
	Current Status	2013/2014 YTD = 1455 2014/2015 YTD = 948 2015/2016 YTD = 493
	Reduction %	48%
	Notes	Volumes down by 48% YTD, with a 66% reduction on volumes in 2013/2014

Figure 3.5 – Reduction of data changes due to CRM (RICS,2016)

On the other hand, Respondent number 2 mentioned that *"When CRM stops functioning/has bugs it's impossible to continue working; for instance, when we are in the middle of a campaign and CRM it's not working properly, the entire business is stopped; Another negative aspect is the fact that the system is sometimes slow which can cause delays; for instance, when a member is calling and I am trying to open Dynamics in order to have a look on the history, several times the tool is opening the record very slow so I need to keep the customer on the phone for longer time; Another negative aspect is referring to the changes of the system that are done in the*

peak season or in the middle of an important campaign. Sometimes is difficult to get used with the changes so I consider that it would be better to proceed with the changes in a period when there is not so much work that needs to be done." (Respondent 2)

Regarding the changes, as it can be seen from the respondent answer from above, the training is very significant when using a new system, not only at the implementation stage but also when changes are deployed. As a matter in fact, the lack of training can cause frustration as the employees will need to go into SharePoint and learn by their selves how to use the system with the new changes. As an alternative, they are receiving an e-mail with a Word document that is describing how the changes will affect their work. Secondly, after the changes, the integration process with Outlook can be a bit slow and it may cause delays in the employees' daily tasks. For instance, the below figure is showing a very often message that the CRM users receive when changes are happening:
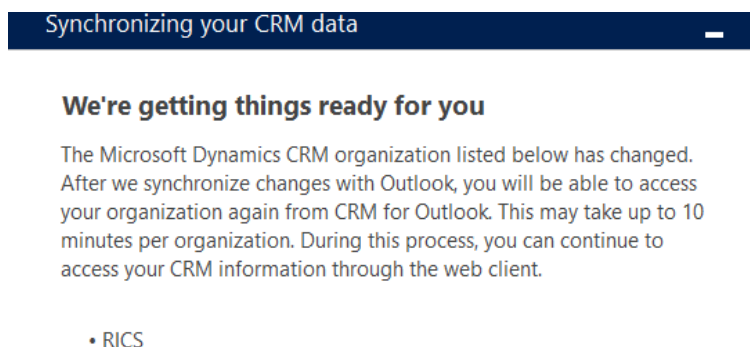

Figure 3.6- CRM changes message (RICS, 2016)

Speaking about the impact that CRM has on the daily performance, it seems that the positive aspects have a higher impact comparing to the negative ones *"CRM helps to have a clear overview of all the customer's data – I consider that it would have been difficult to keep track of every phone conversation/e-mail if CRM wouldn't exist. Working in Customer service, it's perfect for me as I have 360 view of all the*

history and customer's preferences. Imagine working with such a huge number of customers and using spreadsheets." (Respondent 2)

"…For me CRM is a great tool for reporting as I can easily create dashboards and export the data in an Excel file; all the data is in the same place and that's help me saving time" (Respondent 14)

Summarizing, even if 11 employees out of 25 (44%) mentioned that CRM has also negative aspects; the overall feedback especially comparing to the old system is a good one. Issues like lack of training, changes deployment, CRM functionalities can be resolved with a proper collaboration with the IT department.
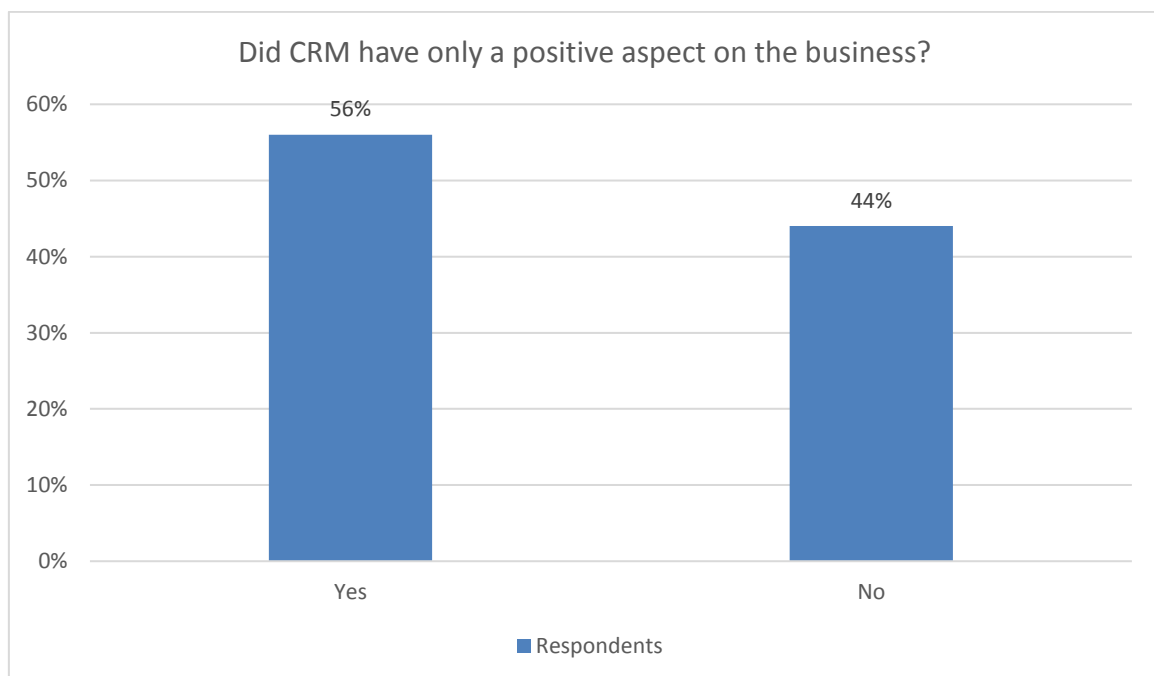

Figure 3.7 – Graphic (overall feedback)

3.4.2.1. CRM and Key Performance Indicators

As the literature was showing that the performance is usually measured with the key performance indicators, RICS is also using KPI's to establish achievements and evaluate the success; this is measured by the fulfilment of an operational goal: e.g.

"Was the case progressed within 14 days of receipt of information?" Microsoft Dynamics is facilitating this process by tracking this information into the system so the employees will know better if they meet KPI's. It is noticeable that CRM plays a significant role when speaking about KPI's as "the *data it stores is key to decision making and measurement about KPI's- e.g. amount of subs collected each week, number of members achieving minimum CPD requirements etc." (Respondent 1)*

It is interesting to see that CRM not only helps enhancing the performance of the employees, but it also helps them keeping track of their KPI's. The marketing team achieved an impressive improvement when due to the better segmentation thanks to CRM they e-mailed 12% less customers in 2015/2016. (RICS, Marketing team 2016)

The users have several functions in CRM that are helping them to achieve their objectives. For instance, they can create tasks and check if tasks were closed within the deadline that was set by the manager. The tasks are containing the timeframe of the action and it can be set for you or for one of the colleague. An example that illustrates how the task is looking like can be found below:

Figure 3.8 – Create CRM New task (RICS, 2016)

As it can be noticed from above, CRM keeps track of the duration of the action that has a direct impact on the KPI's. RICS employees can now have a better

overview of their "to do list" by accessing the queue and every activity has its own timeframe and priority. This way, the tracking activity is facilitated as one of the respondents mentioned: *"CRM helps me keep record of accomplishment of my activities. It helps me monitor closely the number of unconverted leads, my volume of calls handled and number of member's complaints solved."* (Respondent 21)

For instance, the colleagues from the contact centre had to give 15 phone calls per day to meet their KPI's. As every information is recorded in CRM, it becomes very easy to have an overview if the employee met the target or not. E.g. There is a function in CRM that shows the number of the phone calls that somebody completed in an hour/day/week/month/year as it can be seen from the below figure. By pressing "Results" button, all the completed phone calls will be shown; moreover, "Download Fetch XML" option can export all the data in an Excel Sheet. In case a member is using often a specific advance find, he can save it using the option "Save us" and access it by using the function "Saved Views".
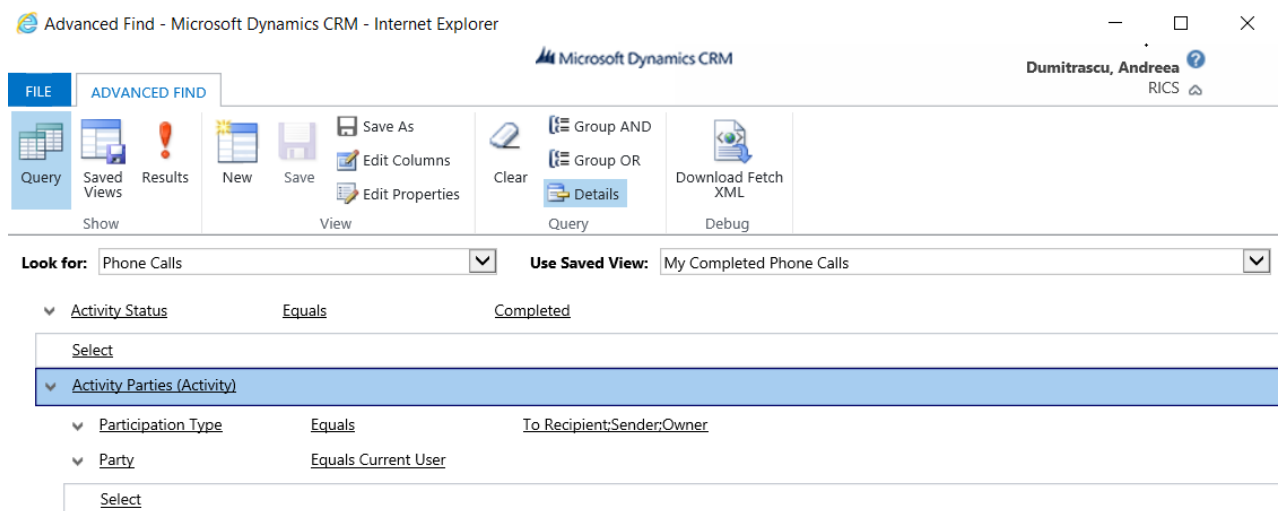
Figure 3.9 CRM – Overview Phone Calls using CRM Advance Find (RICS,2016)

Figure 3.10 CRM – Phone Calls Results (RICS,2016)

Moreover, the employees can set goals in CRM, depending on the target that they have. At the end of the month, the Quality and Assurance team is evaluating the performance of the teams and individuals. As the quality and the tone of the conversation matters when speaking about KPI's, it is easy to have an overview of all the activities by assessing all the e-mails, letters, and phone calls:

Figure 3.11 – Overview CRM Activities (RICS, 2016)

Overall, the respondents are positive and satisfied with using CRM and tracking the performance will underline the areas where RICS should focus more on future improvement projects. (RICS, 2016) However, as a CRM user, I agree with the respondents concerns of the fact that if the system is not working properly, especially in the peak season or in the middle of a campaign, it is impossible to achieve the target, as all the needed information will be there. Moreover, as respondent 17 mentioned, *"it is difficult to get used with all the CRM changes in the peak season"* and that will reflect in the individual's KPI's.

3.4.3   The role within the business process automation

"…CRM help enforce better business processes." (Respondent 1) As a matter in fact, all the 25 interviewees (100%) confirmed that CRM had an important role when speaking about business process automation, affirming that *"that's one of the most important things that CRM brought comparing to the old system." (Respondent 2)*
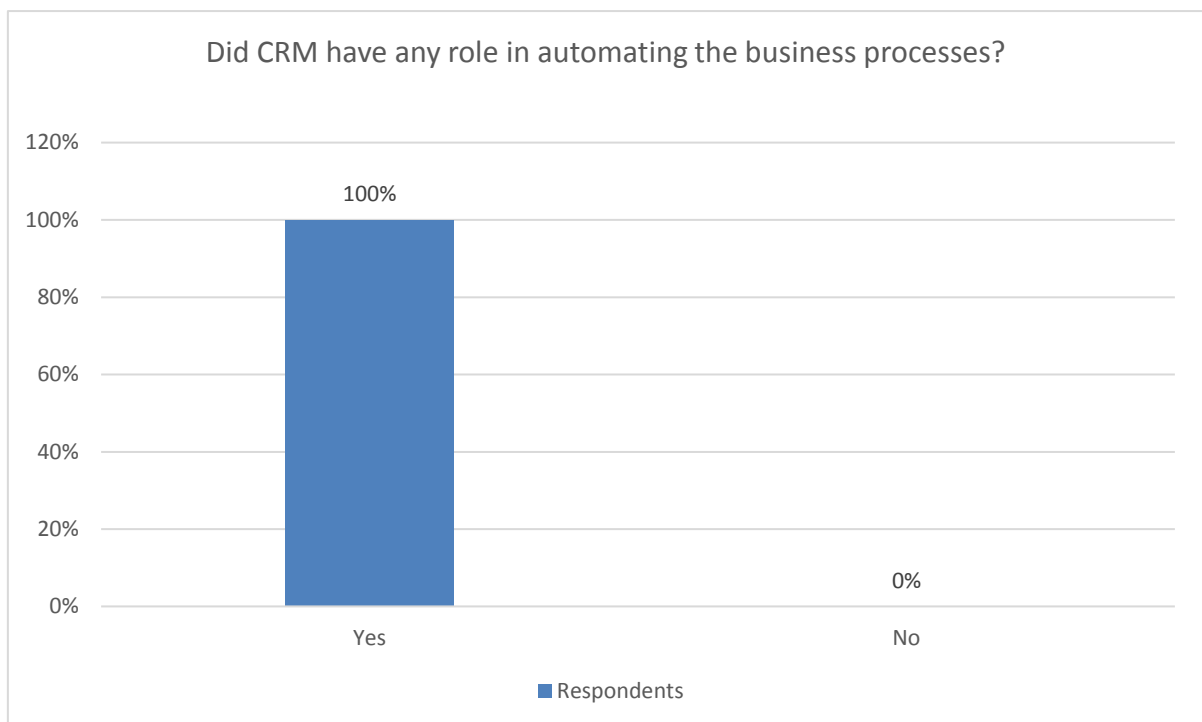

Figure 3.12 – Graphic (business process automation)

As found in the literature, all the respondents confirmed that in the past most of the processes were manual and now they became automated; that is saving time for

everyone and it gives a clear overview of what really needs to be done. Consequently, there is no need to fulfil so many administrative tasks for both employees and members. *"I think the best example for business process automation is the one of the Continuous Professional Development campaign. When RICS was still using MDS, filling the CPD forms was a nightmare. We had colleagues that were calling members and filling the forms over phone. This was time consuming and frustrating. Now, since using CRM, the forms are available on RICS's website, members fill them online and as the form is directly linked with Dynamics and data is processed automatically. At the end of the CPD campaign, the information is easily available."* (*Respondent 21*)

To better explain the respondent's answer, in the past the employees were assisting the members in recording online their Continuous Professional Developing activities but now that the automation is in place, the data is updated automatically. This had a direct impact on the actual business performance because the process was manual and not user friendly and most of the members were avoiding to record their hours by phone or using the Excel Spreadsheet, in this way being uncompliant with the RICS rules. The application used for recording the hours was integrated with CRM and increase in the number of records and hours that have been automatically updated since CRM went live it can be noticed from the bellow data collection:

Benefit	Owner	Target	Method of measurement
Brief, specific description of the benefit, including its type (see notes below)	*Person /role accountable for delivery of this benefit.*	*The desired level of benefit, the unit of measure and the timing. If the benefit will gradually build up over a period of time then a set of values should be provided.*	*The processes, tools, techniques and resources that will be required to measure achievement of the benefit.*
Automated CPD record update supports online CPD adoption	Rachel	Assist in meeting online CPD recording by reducing the burden of admin for members	Measure number of members' records updated through Events CRM link
	STATUS	Automation in place. See **Appendix B** for number of records and hours that have been automatically updated since Events CRM went live.	

Month	2013		2014		2015	
	Count of rics_cpdactivityid	Sum of rics_hours	Count of rics_cpdactivityid	Sum of rics_hours	Count of rics_cpdactivityid	Sum of rics_hours
Jan			1430	4,698.75	1985	6,526.50
Feb			1374	3,755.75	2346	6,630.50
Mar			1669	4,030.00	2040	5,654.00
Apr			1483	3,264.00	1781	5,345.00
May	4	9	1171	3,189.50	1304	4,299.50
Jun	34	136	742	2,450.20	1238	3,536.00
Jul	135	357.5	747	2,805.00	1006	3,055.00
Aug	1198	2,116.50	1497	3,742.75	1648	4,435.00
Sep	1503	3,034.00	3064	6,878.80	2970	7,503.00
Oct	1866	3,692.25	3476	8,442.95	2847	7,436.00
Nov	2785	4,775.00	2154	5,773.80	2464	6,618.00
Dec	670	1,739.75	782	2,454.00	439	1,517.50
TOTALS	8,195	15,860	19,589	51,486	22,068	62,556
Year on Year variance			139%	225%	13%	22%

Figure 3.13 – Automated CRM event updates (RICS, 2015)

Every department has its own automated processes and every team is liaising with the IT to create workflows; after the process is created by the technology team, they just need to search for "Process"- "Run Workflow", select what it is needed and in less than 5 second the process will be executed by the system as it can be seen in the bellow picture:
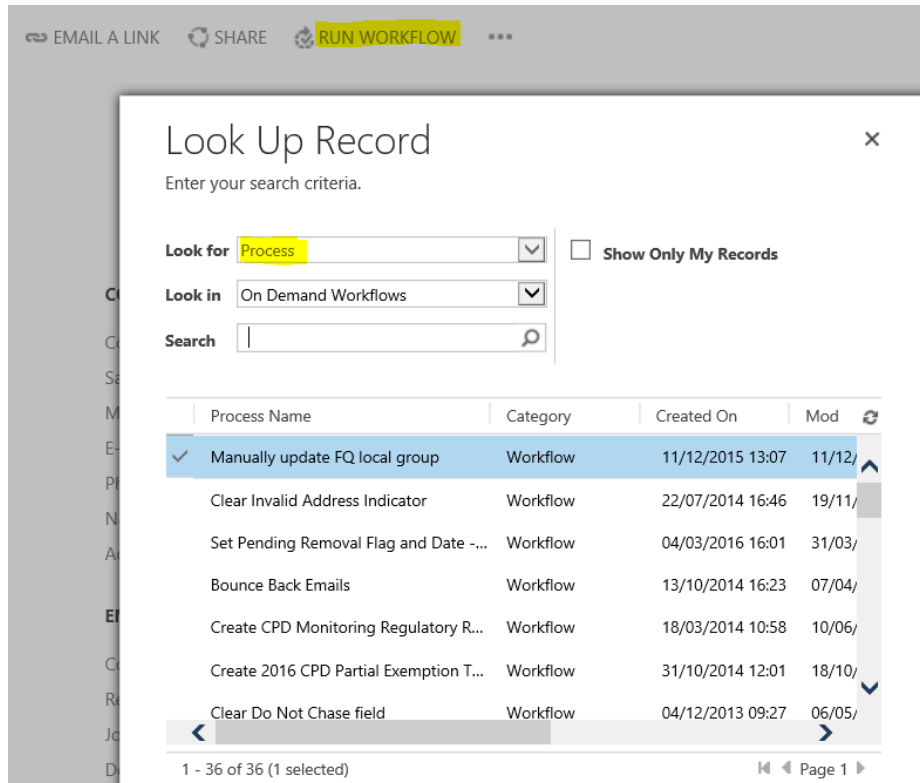
Figure 3.14 – CRM workflows (RICS, 2017)

For example, there is no need to go into all the member's records and put an exemption note/ resignation note when the system can do it in less than 5 seconds. (e.g. as above – Create 2016 CPD Partial Exemption Task)

"… CRM has a significant role in automating the business processes as the tasks became automated (the e-mails are sent from the system, the invoices are sent though the system, the confirmation are sent from the system); we do have different workflows for required action (for instance to de-activate the members that want to resign we just need to click on the workflow and CRM will do that for us) In the past I was losing around an hour to prepare the invoice and send it to the customer and now the system sends it automatically when the client had paid the fee" (Respondent 8)

As it can be noticed from the respondent answer, there is an impressive improvement as if we count the number of members (120 000), invoicing every

customer means 1 h * 120 000 = 120 000 saved hours where the employees can allocate their resources to other important tasks.

Hereby, from my personal experience, I can affirm that I encountered a situation when a workflow had issues and our department had to urgently send reminders to a group of members. Without the reminder going automatically from the system, I spent 2 working days (14 hours) and sent manually all the e-mails, which is incontestably more time consuming than using an automated process. Therefore, CRM plays a significant role when speaking about process automation that is leading to time saving and ability to reduce the number of administrative tasks. Below there is a table that is highlighting the required time and the clear difference between the old system and CRM:

Task	Time required old system	Time required CRM
Sending out invoices	1 hour per each member for the employee to prepare and send invoice	Sent automatically from the system – 0 time for employees
Sending out confirmation e-mails	10 minutes per each member	Sent automatically from the system – 0 time for the employees
Resignation process	Half an hour per each member	Done automatically using the workflow – 5 minutes
Granting exemption	Half an hour per each member	Done automatically using the workflow – 5 minutes
Sending out welcoming letter	20 minutes per each member	Done automatically though the system – 0 time
Sending out certificates	25 minutes per each member	Done automatically from the system – 0 time

Table 3.3. – Comparison of required time

However, CRM systems do not have the visibility into a couple of the process and sub-processes of RICS related to customers, nor can it manage the interactions between them. *"Several processes lie outside of the CRM system's area of automation, since the system loses control of the transaction process as soon as it begins to run through the organisation; it is better to know where exactly should be the boundary between an ERP system and a CRM system, as CRM is more a database for the customer where an ERP system can better handle other processes related to sales, materials, planning execution, etc."* (Respondent 20) Out of 25 interviewees, 7 mentioned the fact that the organisation is still using several manual processes that they would like to automate in the future. This is an interesting perspective taking into consideration the fact that Ables (2011) was mentioning in his study that Microsoft Dynamics is incorporating some ERP functions; however, it seems that the integration of Microsoft Dynamics with an ERP system within RICS can help in enhancing the business processes.

3.4.4. Customer service within RICS

Concerning the customer service, all the 25 interviewees (100%) confirmed that CRM had a positive impact, improving the customer service, as *"it should be the one source of the truth that details all interactions between us and the customer."* (Respondent 1)

As mentioned, the system keeps track of all the activities by pressing the "Track" button and selecting the reference or the name of the specific firm/contact. Moreover, the e-mail it will go into the closed activities of the CRM user so he can always see it in the "Closed/Open Activities" section. The figure below shows how an e-mail is being track in CRM:

Therefore, all the information will be stored in the system and that *"… definitely improves the relationship with our members. Having all the information available in one place and accessible from anywhere is clearly helping RICS to communicate faster and easier with our members, which in the end can improve customer satisfaction."* (Respondent 20)

It is important to mention that almost half of the respondents agree with the fact the satisfaction increased since they are using CRM so that is an end effect of the system usage. However, 15 interviewees (60%) do not have the answer at this question, admitting the importance of CRM but without linking this with the actual satisfaction:
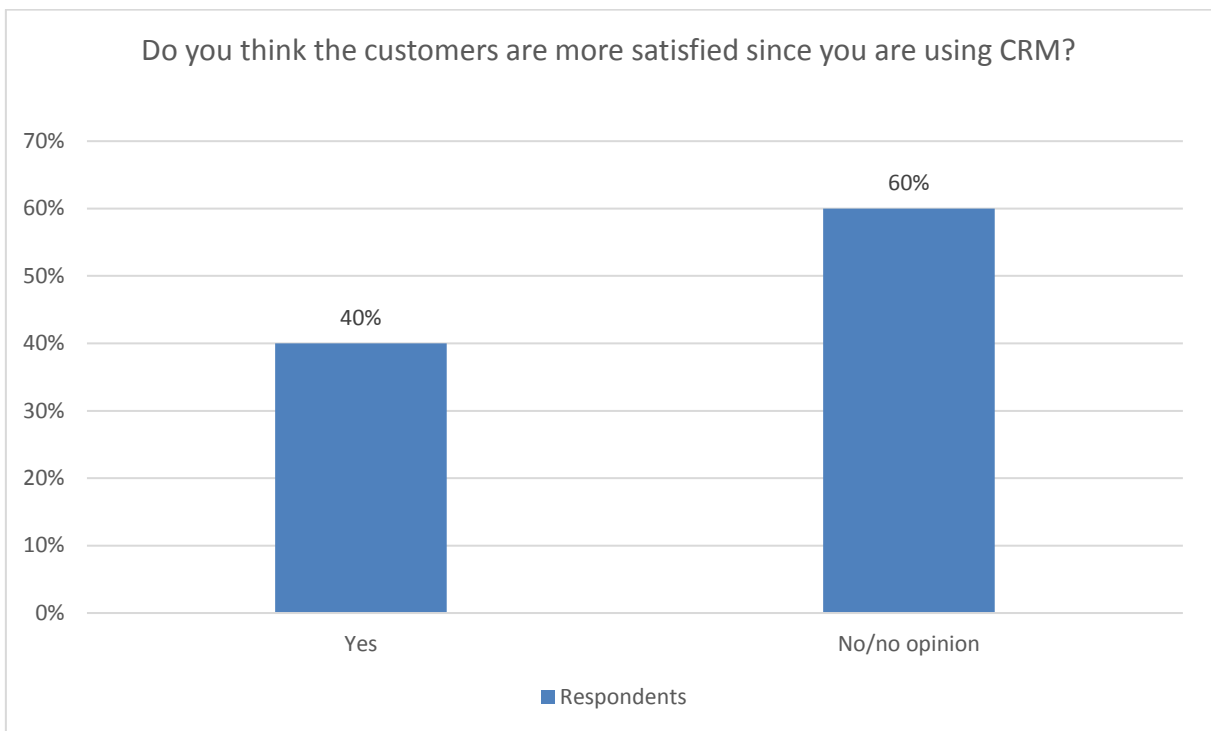

Figure 3.15 – Graphic (customer satisfaction)

"…Not sure I can answer that! If CRM was not there then I can't see how you could ever manage over 120,000 active contacts" (Respondent 1) On top of that, the figure from below shows the grow of the customer satisfaction over years;
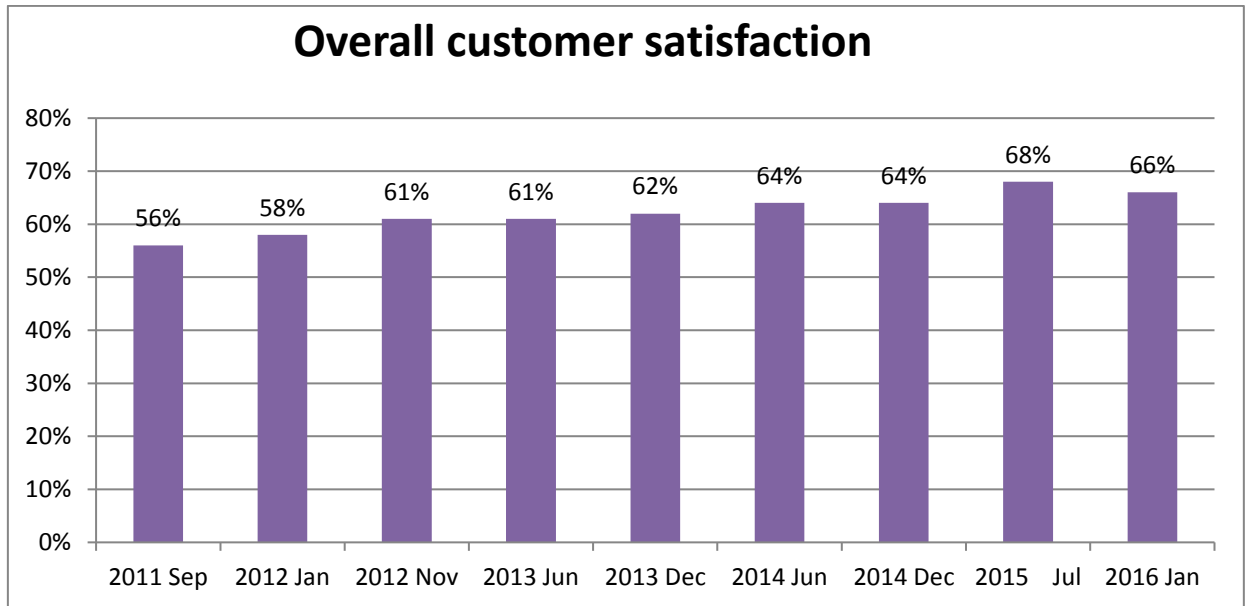
Figure 3.16 – Overall customer satisfaction within RICS (RICS,2016)

Mithas showed in his study that Customer Relationship Management is increasing the satisfaction and customer knowledge. (Mathias et al., 2005) and Gartner defined CRM as a strategy that maximizes the overall satisfaction, this being a crucial function of the system. (Gartner, 2013) By having access to the internal documentation, which calculated the overall customer satisfaction since CRM implementation, it is noticeable that the satisfaction went up during the years; however, there are no major changes between Nov 2012 and June 2013, July 2014 and Dec 2014; In July 2015, there was a significant positive difference comparing to December 2014 – 4%, this one being the biggest raise since the implementation. On the other hand, it is remarkable that in January 2016 there is a significant negative difference. It is important to mention that since the CRM implementation until January 2016 there was no drop down in customer satisfaction. The sample is robust and representative, including 6,228 members from all over the world. 96,338 email invitations were sent out and 55% of those who clicked on the linked answered the satisfaction questions. The percentage of 66 is divided as follows:

62
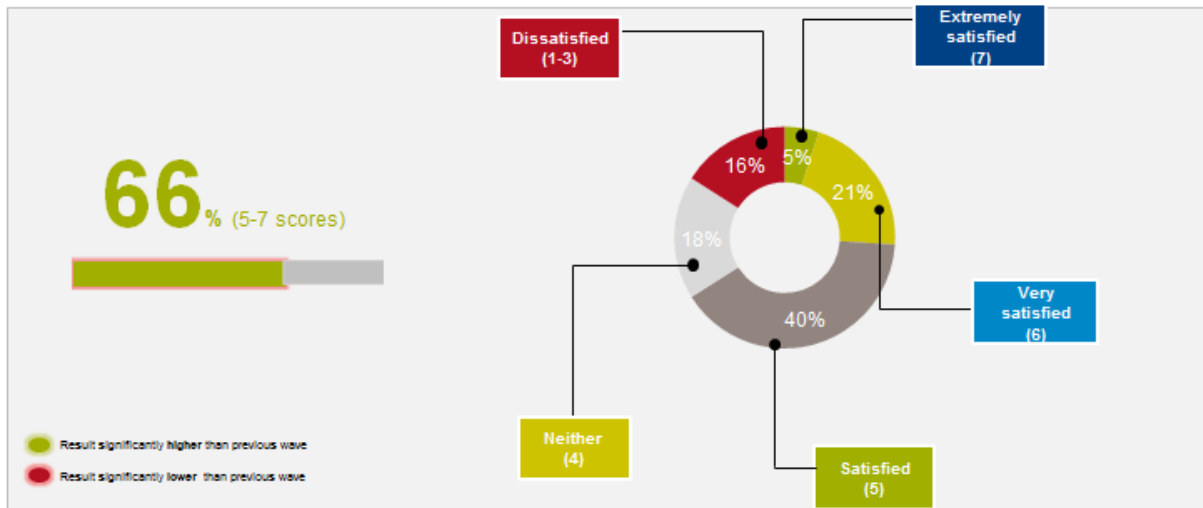
Figure 3.17 - Interpretation of overall satisfaction results 2016 (GfK for RICS, 2016)

Overall Satisfaction is declining significantly following the unprecedented high levels of positivity from last year in July. (GfK for RICS, 2016) However, is important to mention that levels remain closely aligned with the long-term trend. The minority of members are affirming to be extremely satisfied (5%) and most them seem to be satisfied with RICS (40%). Even if the overall percentage of satisfaction went significantly down comparing to 2015, we notice that the number of the customers which are dissatisfied is not as high, being represented by a percentage of only 16%.

The decrease can be explained with the version of CRM that RICS is using for the moment, which is Microsoft Dynamics 2013 (taking into consideration the fact that now we are in 2017). Unfortunately, *"without upgrades it is difficult to keep the system up to date and different bugs are appearing that may affect the time responsiveness of the employees and the customers may not be happy with it"* *(Respondent 13)* Out of 25 interviewees, 10 persons (40%) mentioned that the delays are existing due to the fact that often the system is too slow and it needs to be upgraded. However, the customer satisfaction may be influenced by many other factors (the quality of the products, marketing, etc) even if it is clear that CRM is also playing a role.

As a consequence, the system needs to be upgraded and both the employees and customers will benefit from this: *"If we do not upgrade, then we won't stay close*

to the current Microsoft version which will make future upgrades even more time consuming and risky. Microsoft is due to release version 2017 soon and RICS need to be on a version that is easily upgraded to this once it's a stable platform."
(Respondent 20)

From my personal experience, as an employee and CRM user, I would say that the system really need an upgrade even if it implies higher costs, as this will have an impact on both employees and customer's satisfaction: if the tool is up to date the employees will work faster and be more responsive, and this will affect the satisfaction of the clients. Most of the respondents (90%) affirmed that they will work better when they will have an upgraded version.
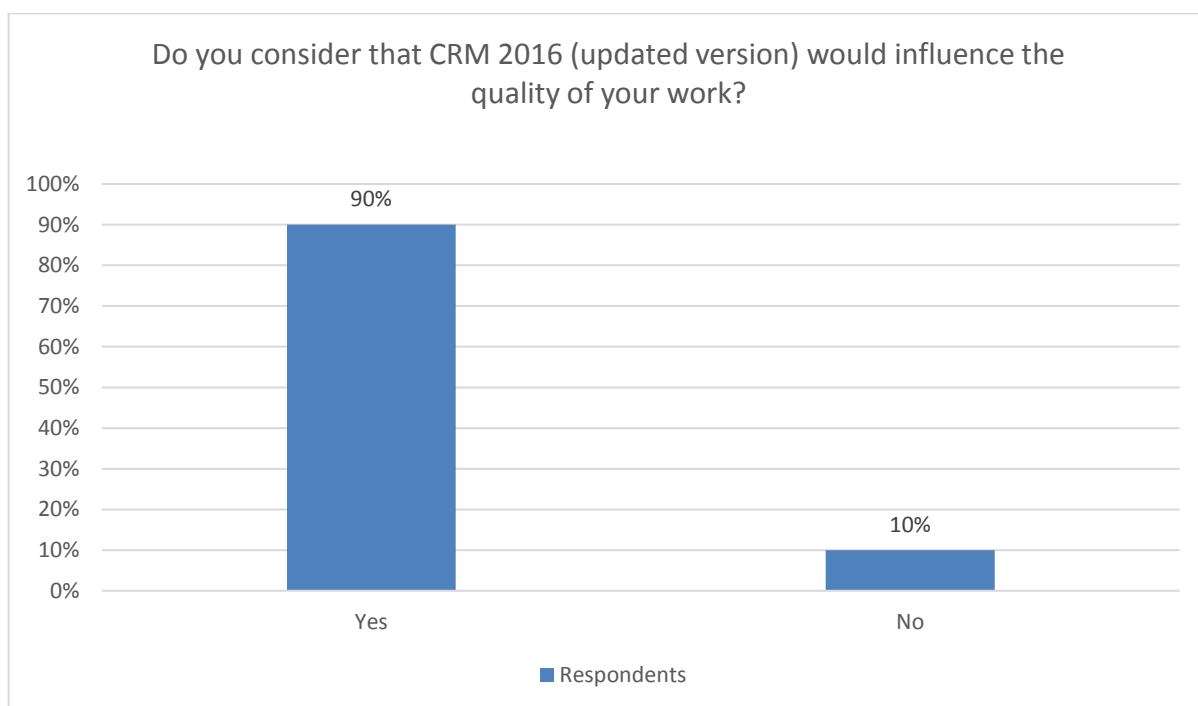
Figure 3.18 – Graphic (upgrade CRM)

As a matter in fact, RICS technology team decided to upgrade to CRM version 2016 during this year. A robust CRM system is essential to RICS business performance, as well as relationships with the customers and professional firms, and data security and handling. As such, it is important that the organization remain close to the latest version of the Microsoft CRM product and protect investment already

made into the platform. User acceptance testing is currently underway with support from department representatives, who are helping to identify any major issues and ensure that existing business processes continue to work in the upgraded system. As this system upgrade is very complex, testing is a vital process to ensure a trouble-free implementation.

It is expected that the new version of CRM will increase the business performance and the relationship with the customers so the satisfaction should increase again. Even if nearly half of the employees which were interviews (40%) linked CRM with the satisfaction of the customers, none of them found any linkage between the customer acquisition and the system, despite the existence of the connection from the literature:

"…No. CRM is just the system to record data and help sales people …it's untimely up to our membership teams to sell membership and get across the reasons why joining the RICS is so beneficial to them" (Respondent 1)

Figure 3.19 – Graphic (customer acquisition)

Hereby, as a CRM user, I cannot find the connection between CRM and the acquisition of new customers as this will be related to the sales persons. Taking into consideration the mission and vision of RICS that was mentioned in the beginning of the chapter, the market that RICS is targeting is very specific and the reasons why becoming a RICS customer are very well defined. Moreover, the sales team is pr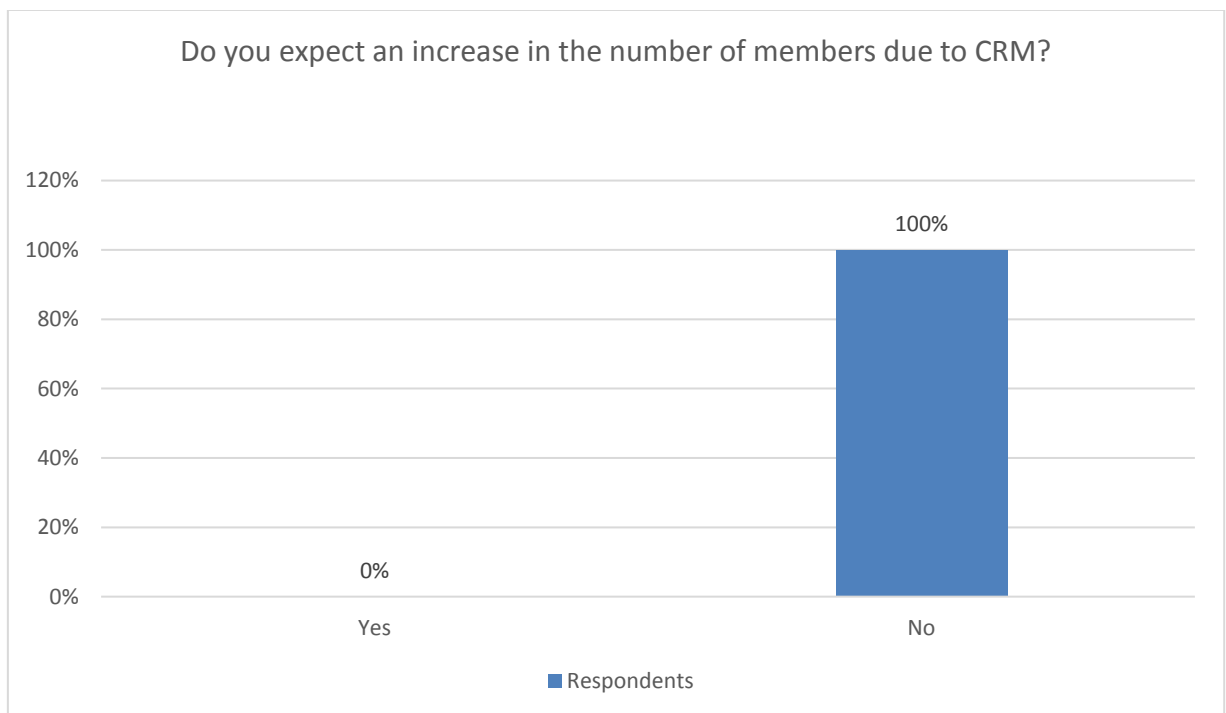omoting this mission by explaining to the external actors the reasons behind becoming a member, which are related to their profession but not to the technology that the organization is using. In case they need RICS service they will use it, without asking questions about how updated their technology is. Of course, RICS is collecting data about the potential customers which is saved in CRM in the pipeline; data analysis will be used to enact, in real-time a personalised customer experience. CRM helps building engagement and knowledge and indeed this is related to the customer satisfaction but not necessary to the customer's acquisition. Indeed, that is the case within the analysed organization and it is difficult to generalize this aspect.

Summarizing the study case, the present analysis highlighted important aspects concerning CRM, confirming the contribution that the system has on the process automation, customer service and employees' performance. Firstly, regarding the impact that the tool has on the employees, this part underlined the fact that even if CRM brought several positive changes in the organization when speaking about the employee's performance, there are also a couple of negative aspects that needed to be mentioned: lack of training may cause delays, the system is too slow sometimes, changes in the system done in the peak period; the most important aspect that needs to be mention is the dependency on CRM and the fact in case CRM has issues this will impact the entire business that won't be able to function anymore. The technology team is aware of that and is trying to resolve the issues as soon as they appear. However, the positive aspects that CRM brought seemed to have more impact, as the employees are more satisfied when by the overall work; on top of that, they can easily have an overview when speaking about their KPI's. The implementation and usage of CRM also affected the customer service, being improved significantly, as all the respondents mentioned. However, despite the

literature's affirmation, CRM does not have any impact on the customer acquisition. The highest impact was on the process automation, as all the interviewees mentioned that the processes are better since CRM is in place, helping them to save time as the business processes are running smoother. The secondary data showed that the amount of data changes was reduced with 48% since CRM implementation, which is a significant improvement.

Chapter 4

4.1. Conclusions

As the aim of the paper is to underline the effects of CRM implementation and usage in an organization, the conclusions that will include the answer to the top question and sub-questions will be drown based on the theory, empirical research, and personal experience as a CRM user. Overall, CRM is a very complex concept and it is interesting to see if the companies are really benefiting from the whole functionality of the tool.

The first part of the paper is capturing the general aspects of CRM based on the literature research and it is showing how many benefits the tool can bring including: process automation, improved customer service, enhancing the employee's performance. The above effects are very popular within the CRM theory and can improve the whole business. Therefore, the literature is highlighting the fact that CRM puts the customer in the centre and it helps in the process of creating relationships characterized by mutual trust. Moreover, CRM is radically increasing the process efficiency and employee's productivity by automating the business process. The manual workflows are drastically reduced and in this way the employees are saving time focusing on other tasks. Moreover, as CRM helps them to have access to the entire customer's history, it is easier to handle a wide range of queries while delivering the best service and keeping the customers satisfied. Therefore, the 360-degree approach is directly impacting the process of building authentic relationships with the customers.

After presenting the general aspects of CRM, the theory underlines the importance of Microsoft Dynamics which is a CRM tool considered to be the leader in this field. One of the reasons why Microsoft Dynamics is on top is linked to the integration process, as the system can easily transform Microsoft Outlook in a place where all the customer information is stored, use Excel to export spreadsheets and Microsoft Word to send templates or mail merge. Therefore, Microsoft Dynamics not only has a role in the process automation, customer relationship improvement,

employee's performance but it also has clear advantages when speaking about usability and user friendliness.

The second part of the paper is emphasizing a real business case capturing the effects that the implementation of Microsoft Dynamics has on the organization. All the information is in one place and everybody within the company can have access to it enabling a complete customer profile; It is not just data, the information is presented in a way that it makes sense, meaning that Microsoft Dynamics is a great tool for Business Intelligence. If I had to summarize the benefits that CRM brought to RICS – I would say "information visibility and efficiency." Going back to the research sub-question related to the customer service, Reinartz (2004) viewed CRM as a process of initiating and maintaining relationships with the customers. Despite the important role that the tool has when identifying the prospect's need, the present analysis revealed that CRM does not have any role in customer's acquisition; within RICS, that aspect is related only to the sales team. However, the respondents did not deny the impact that CRM has on the customer's satisfaction, as the tool helps the employees to keep track of their preferences and wishes. However, it seems that the tool needs to be upgraded as the organization is still using the 2013 version even if now we are in 2017 and this is affecting the employee's responsiveness which is impacting the customer satisfaction.

The thesis concludes that CRM helped the employees in completing the daily tasks, reducing the number of administrative tasks and manual workflows. Since Microsoft Dynamics is in place, they are saving time using automated workflows so the team's potential is enhanced. The analysed data showed that the employees are spending less time on sending out confirmation e-mails, welcoming letters, invoices comparing to the time when they were using the old system. Moreover, the amount of data changes decreased with 48% since the system was implemented. Summarizing, CRM may be considered as a *"business process management strategy that maximizes relationships and encompasses the entire organization using the technology available".* Bibiano et al., (2007) Overall, the employees are satisfied with the CRM system, although there are some interesting aspects that need to be taken

into consideration: firstly, when the CRM stops functioning properly that affects the whole business and the impact is even higher in case that will happen in the middle of a campaign. When the system is unavailable it is impossible for the employees to continue with their tasks. Moreover, the analysis discovered also that the lack of training when changes are deployed may also affect the employee's performance. On top of that, several respondents mentioned that the system is encountering errors sometimes and the integration process with Outlook it can be slow. As the employees mentioned that they will perform better if having an upgraded and faster version, the technology team is working on this matter it is important that the organization remain close to the latest version of the Microsoft CRM product

4.2. Improvements of the processes using an ERP system

The first part of the present study showed that Microsoft Dynamics is so flexible that is even integrating functions which are related to Enterprise Resource Planning. (Ables et al., 2011). Some of the functions are referring to sending invoices though the system, processing orders, etc. The study case highlighted the fact that indeed Microsoft Dynamics is enhancing the business processes by automating them which saves considerable time. However, the analysis showed us that some RICS processes lie outside the area of CRM automation, which means that even if CRM had a role in automating the processes, there are still other processes that need to run smoother. As a matter in fact, to improve the processes the integration of a proper ERP system could be the solution. CRM is a customer oriented tool where ERP is more business tool; the similarity is that both are allowing the data sharing across all the departments. As an ERP tool allows a perfect overview of all the operations and is coordinating the processes (Kale, 2016), I would affirm that an ERP system integration could be the solution for business process improvement. The figure from below is showing how a CRM system can work together with an ERP system to enhance the enterprise intelligence. The analysis found that some of the processes related to sales, planning and execution lie outside the CRM's sphere so in the future a ERP system could be the solution for further improvement as it is facilitating the use of resources within an organization. (Bangniyel, 2011) However,

as an ERP system involves a high investment when implementing it (Kremzar & Wallace, 201), the technology team will need to analyse the needs of every employee by creating the same wish list that they did for CRM to see what how an ERP system can bring value to the company. After that, they will be able to balance the costs with the benefits and see if an ERP system is really needed or is there any other solution for the mentioned processes that need improvement.
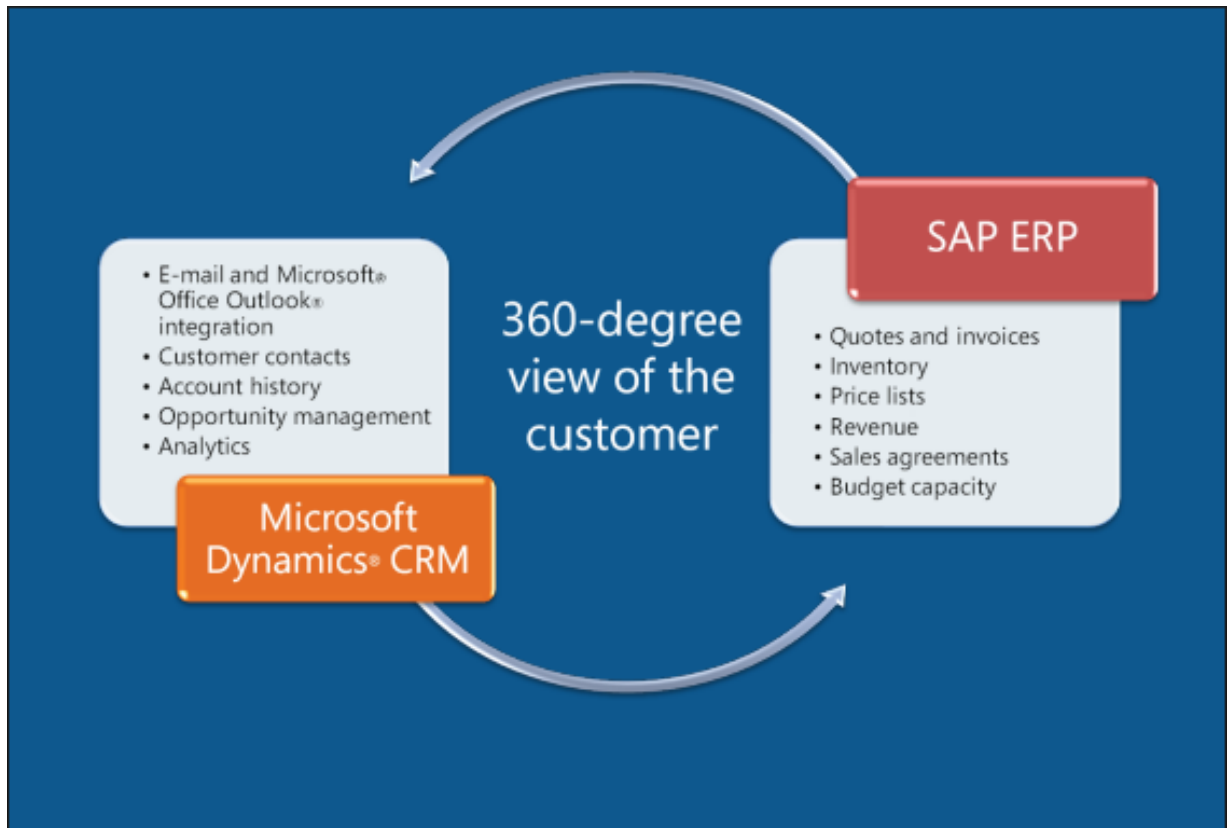
Figure 4.1 – ERP and CRM Integration (CRM World, 2014)

4.3. Recommendations

Overall the present findings of the paper relate to those of other authors, showing that CRM has an important role in the customer's interaction, business processes automation and employee's performance. The results could support the analysed organization into correcting and improving several aspects like providing more training for CRM users, upgrading the system more often as this can impact the overall business performance. Currently the organization is testing the new version of

CRM and soon it will go live. A strong recommendation is that every employee should benefit from training after using the upgraded tool so that the KPI's will not be affected. As the technology is constantly evolving, the company can take into consideration the integration of an ERP system with Microsoft Dynamics as this could help for a better operational view and for the automation of the business processes that lie outside CRM's area. The feasibility of this aspect could be discussed and analysed further as the implementation of an ERP system require a huge investment. Therefore, a cost-benefit analysis will be required before considering this aspect.

4.4. Limitations

The present analysis did not capture the insights of the respondents after the CRM version was upgraded to 2016 as for the moment the technology team is still testing the version. Therefore, going further, it will be interesting to see if the new version helped in achieving benefits. From a statistical perspective, there are some data limitations as it is impossible to link all the organization's performance only to Microsoft Dynamics. For that reason, the paper is capturing a qualitative research including valuable insights and judgments related to CRM that are drawing the big picture of the way that Microsoft Dynamics affected the business.

Annex 1

CRM Wish List (What customers want from CRM so that...)

As A	I Want	So That	ID
Member Ops Administrator	to be able to select flexible interview times	we can accurately record interview times	1
Member Ops Administrator	the Primary Professional group to auto populate based on pathway	we can ensure this is set accurately	2
Product Team Member	to indicate if a candidate defers their assessment & the reason why	we can analyse this and provide support / training	3
Reference Services Member	to send out acknowledgement emails automatically	enrolment acknowledgements	4
Member Ops Administrator	using reference numbers	better tracking	5
Member Ops Administrator	CRM to automatically update the CAD when a candidate passes assessment	we can ensure this is set accurately	6
Reference Services Member	all staff to be on CRM as contacts	we can email them from the system	7
Member Ops Administrator	the "No of Attempts" field to be fixed	we can support candidates through their applications	8
Regional Director	to assign membership enrolments to opportunities	we can fully track our activity	9
Member Ops Manager / Customer Services Member	schemes to be captured on CRM	we have full visibility and can manage membership of schemes and subscriptions	10
Product Manager	the functionality to record re-accreditations	we have visibility of members' progress in re-accreditation	11
Member Ops Administrator	decrease the number of steps to record membership application results	the process runs smoother and frees up time to hit deadlines	12
Member Ops Administrator	remove the default mouse-wheel scroll from the Title field	titles do not get accidentally amended	13
Member Ops Administrator	change the order of accredited dates for courses	we save time scrolling through too many screens	14

Reference Services Member	CRM to stop allocating a regarding line to all cases	we can obtain greater efficiency	15
Member Ops Administrator	to be able to postdate changes to a member's records	enquiries can be handled quicker	16
External Affairs Member	upload multiple records at once	we gain efficiency	17
Reference Services Member	search for contact by email address	we gain efficiency	18
Reference Services Member	provide leads for the sales teams	we exploit potential opportunities	19
Reference Services Member	flag important cases	we can prioritise our efforts	20
Marketing Member	full integration with E-circle	we can track all email activity and ensure accuracy in data selections	21
Customer Service Member	full integration with E-circle	we can see all correspondence	22
Customer Service Member	all correspondence captured in CRM	we can see all correspondence	23
Member Ops Manager	full integration with E-circle	we can see all correspondence	24
External Affairs Member	full integration with E-circle	we can see all correspondence	25
Member Ops Administrator	track all emails in CRM	we can see all correspondence	26
Customer Services Member	view all marketing emails	we can provide better customer service and increase satisfaction	27
Marketing Member	to use the full campaign functionality	we can track all marketing activity and ensure accuracy in data selections	28
Member Ops Administrator	online APC enrolment activity to feed directly into CRM	the length of time it takes to manually process these applications does not cause cash-flow problems	29
Member Ops Administrator	online final assessment activity to feed directly into CRM	the length of time it takes to manually process these applications does not cause cash-flow problems	30
Member Ops Manager	firms to be able to confirm online payment support for their trainees	this auto prompts invoices to be raised	31
Member Ops Manager	firms to be able to confirm online payment support for	this auto prompts invoices to be raised	32

	their trainees		
Member Ops Administrator	an online feed from resignation requests	speeds up the resignation process	33
Member Ops Administrator	online Fellowship applications	speeds up the application process	34
Member Ops Administrator	online re-admission applications	speeds up the application process	35
Member Ops Administrator	online assessor schedules - email versions initially	we can see assessor availability to speed up panel creation and address shortfalls	36
Member Ops Administrator	online member expenses	the length of time will be shorter	37
Membership Assessment Team Member	online registration to cover assessment applications & fee processing	the information for applicants is accurate and manual processing is reduced	38
Membership Assessment Team Member	an online diagnostic tool to capture info straight into CRM	membership & assessment enquiries are captured & can be followed up	39
Product Team Member	details of new Fellows automatically uploaded into key areas of RICS	manual processing is reduced and consistency is ensured	40
Customer Services Member	all applications to be done online	the length of time it takes to manually process these applications does not cause cash-flow problems	41
Member Ops Manager	a related entity for APC doctors which auto updates the web	we can better support our candidates	42
Member Ops Administrator	an alternate designation application supporting workflow	we can manage these applications	43
Member Ops Administrator	candidates & assessors to be notified by an automatic email	processing times are sped up and information is accurate	44
Membership Assessment Team Member	an automated contact strategy for each of the global routes to membership	our ability to support and measure candidates progress through assessment is improved	45
Member Ops Administrator	an automated process to support WR elections	our ability to support and measure applications is improved	46
Member Ops Administrator	an automated process to support SPR	our ability to support and measure applications is	47

		improved	
Member Ops Administrator	an automated process to support address changes notifications for Grad candidates	we can ensure candidates' firms have approved training plans	48
Member Ops Manager	an automated process to support post assessment questionnaires	we can seek feedback from candidates & assessors	49
Member Ops Administrator	an automated process to support Fellowship applications	our ability to support and measure applications is improved	50
Member Ops Manager	an automated process to support our audit process	we can accurately track audit requirements and outcomes	51
Member Ops Manager	an automated process to support our Associate contact strategy	we can communicate with the right people at the right time	52
Member Ops Manager	an automated process to support our PER contact strategy	we can communicate with the right people at the right time	53
Membership Assessment Team	to implement regional variations of contact strategy	all candidates are fully supported	54
Member Ops Manager	an automated process to support our APC strategy	we can communicate with the right people at the right time	55
Product Manager	an automated process to support re-accreditation	our ability to support and measure applications is improved	56
Member Ops Administrator	an automated process to support resignations	our ability to support and measure resignations is improved	57
Member Ops Manager	an automated process to support appeals	our ability to support and measure appeals is improved	58
Member Ops Administrator	an automated process to support schemes	our ability to support and measure schemes is improved	59
Member Ops Administrator	an automated process to support scheme members	our ability to support and measure scheme membership is improved	60
Member Ops Administrator	an automated process to support re-admissions	our ability to support and measure re-admissions is improved	61
CRM User	an automated process to ensure the correct fields are used for a change of	our data is kept accurate	62

	details request		
Customer Services Member	to give open cases to other departments	we can improve customer service and provide seamless service	63
Reference Services Member	to give open cases to other departments	we can improve customer service and provide seamless service	64
Reference Services Member	receive emails in a library inbox	we can work on them without deleting or re-opening a case	65
Reference Services Member	reply to an email passed on as a CC	we can be more efficient	66
Product Manager	scheme application & subs fees to be recorded in CRM	we can provide better service	67
Product Manager	the ability to take payment for scheme application & subs fees through CRM	we can provide better service	68
Regulation Member	to see all regulation fees in CRM	we can provide better service	69
Customer Services Member	an effective events administration system integrated with CRM	we can run our events more efficiently	70
Professional Groups Member	a better search that shows firms without multiple entries	I can find contact details more easily	71
Member Ops Administrator	all candidate workshops & training to be recorded in CRM	we can manage our pipeline and process applications	72
External Affairs Member	easily log letters & emails	we can provide better service	73
Product Manager	to record all assessment criteria for each product & the results	we can monitor success against each of them	74
Member Ops Manager	applicant screens to default by product / route	the info is captured accurately	75
Member Ops Administrator	drop down options on assessor type	the info is captured accurately	76
Member Ops Administrator	to tidy up the drop-down options on CRM fields	they match our requirements	77
Member Ops Administrator	to record top-up valuation assessments	we can manage the VRS scheme	78
Member Ops Manager	application start / end dates for all products	the info is captured accurately	79
Member Ops	a PER candidate grade	we can accurately track the	80

Manager		PER pipeline	
Product Manager	to be able to close (not deactivate) applicant records	we can monitor previous applications	81
Professional Groups Member	the account manager notfied of changes to the record	they are kept informed	82
Member Ops Adminstrator	panel scheduling to be managed through CRM	we save money when producing panels and eliminate errors	83
Reference Services Member	to be able to change a contacts business email without going through the account record	this improves efficiency	84
Sales Member	to track new sales in CRM	we can manage the sales process effectively	85
Reference Services Member	only to see the templates for my department	the system is easier to use	86
Reference Services Member	"	we can respond to the correct email address	87
Customer Services Member	to reply to a non-primary email without having to change the underlying data	we can respond to the correct email address	88
Customer Service Member	to reduce the number of stages required to order cards / receipts / mail merges etc	this improves efficiency	89
Member Ops Administrator	auto-payment of assessor fees	we are more efficient	90
Member Ops Administrator	track refunds in CRM	we provide better service	91
Member Ops Administrator	an alert to tell me when I have added a debt	duplicate debts are avoided	92
Products Member	FAS data to be on a separate tab in CRM	it improves FAS administration	93
Products Member	FAS admin to run through CRM	it improves FAS administration	94
Customer Services Member	my last 20 Contacts & Accounts to be visible	we provide a better service	95

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