Why Your CRM Implementation Will Fail

為什麼您的客戶關係管理導入專案會失敗

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Customer Relationship Management (CRM) implementations fail at an alarming rate. In fact, your implementation probably will not meet your goals either. I have heard of few that actually do meet their goals. Unfortunately, the primary reason is not software difficulties. Regardless of what Salesforce and Microsoft tell you, neither of their platforms are easy to implement.

More importantly than that, it is easy to tell when the implementation is going the wrong way. You can tell before the project even starts. For instance, you know when you hear arguments break out between IT and Sales and Marketing over who is going to drive the project.

客戶關係管理 (CRM) 的導入專案正以令人驚訝的速率不斷失敗。事實上，您的導入專案可能也沒有達成您的目標。我曾聽過少數真的有達成目標的。很不幸的，主要的理由不是因為軟體技術上的困難。不管 Salesforce 以及微軟告訴您什麼，他們的平台都不容易導入。

更重要的是，當導入出問題的時候很容易就發現。您甚至可以在專案還沒有啟動前就發現。例如，當您聽見資訊技術部門和業務行銷部門之間爆出誰才是專案的老大之類的這種爭議時就知道了。

Sales and Marketing

業務行銷部門

Sales and Marketing teams make a great case; after all, in classic business structures they "own" the customer and are the ones that drive the customer communications. They know that the minute anything goes wrong the account manager's phone is the one that rings—whether the issue is with an invoice or an installation. They are the center of the customer's world and need to sponsor and drive the CRM implementation. Or, so they say.

業務行銷團隊的立場說得好；畢竟，在傳統的企業結構之中，他們「擁有」客戶並且是推動與客戶溝通的團隊。當某位業務經理的電話鈴聲響起時他們馬上知道出問題了 – 要嘛是發票出問題或是安裝出問題。他們就是客戶的世界中心並且必須控管及主導客戶關係管理導入專案。或者，至少他們是這麼說的。

Information Technology's Case

資訊技術部門的案例

IT makes a strong case, too, by pointing out that for the CRM to be effective it needs to integrate with every system from Customer Support, to Sales, Invoicing, Shipping and Receiving, Engineering, Scheduling, etc. With this level of integration and the technological hurdles that must be cleared, IT clearly needs to drive the implementation or the resulting deployment will be a hodge-podge of interfaces where only some of the data required to deal with the customer is available across the organization.

資訊技術部門的立場也很強，他們點出若要讓客戶關係管理有效率就必須整合所有的系統，從客戶支援，到業務，進銷存，工程設計，排程等等。以如此程度的整合及技術上的難度要突破，當然需要資訊技術部門來主導整個導入專案，要不然最後的佈署將會變成一個各種介面的大雜燴且僅有部份所需的客戶相關資料能夠跨部門取得。

They Are Addressing The Wrong Problem

他們正在處理錯誤的問題

The logic behind both of these arguments is sound; however, they are both flawed. With all their passion, they have unfortunately taken a myopic look that the problem and missed the big picture. The goal of a CRM implementation is to create a uniform treatment of the customer regardless of who in your company is addressing them. It should lean out the customer interface by allowing the customer to talk to anyone and get the correct answer.

For instance, if a customer is on credit hold, it wastes company resources to answer engineering questions, to prioritize their requests for proposals, look up replacement parts, ship them more product, etc. Everyone in the company needs to see the same data and have the same process to follow—in this case, politely tell them to talk to accounts receivable. Imagine a high-volume customer who is current on their bill getting second-class treatment to a delinquent customer. Although all of us want to treat customers with respect, we also need to reward our best customers.

The problem with Sales and Marketing's argument is that the customer should not need to go through them to solve an issue. Every group should have the same data. Everyone in the company should treat the customer the same.

This is where IT is both right and wrong. A complete CRM implementation does touch every system in the company. It is a huge integration effort and IT will spend a significant amount of time and money making these interfaces work. However, technology does not solve the problem—it is only a tool. For a successful implementation, we must first change the attitudes of the people and process that they follow.

這些爭議背後的邏輯聽起來似乎合理；然而，兩者都有盲點。雖然充滿著熱情，但很不幸地他們看問題時見樹不見林。一個客戶關係管理的導入專案是為了要在公司內部無論是誰來處理客戶的需要時建立一種一致性的作法。應該要把與客戶互動溝通的介面瘦身以至於如此一來客戶就可以跟任何一位企業內的同仁對談並得到正確的答案。

例如，如果一位客戶的狀態是付款的信用待查驗，那麼回答他們工程的問題、提高他們取得建議的優先次序、找出要換掉的零件，或是寄給他們更多的產品等等，就真是浪費時間了。企業內的每一位需要得知相同的資料並且按照相同的流程來跟進 – 以此案例來講，可以很有禮貌地請他們跟財務或收發部門談。雖然我們通通都想要以客為尊，但我們也需要回饋最好的客戶。

業務行銷部門論點的問題是客戶不一定非得透過他們才能解決一個問題。每一個團隊都應該有相同的資料。企業內的每一個同仁都應該以一致的方式對待客戶。

這也是為什麼資訊技術部門有對也有錯的地方。一個完整的客戶關係管理導入專案確實涉及公司中的每一個系統。這是一項巨大的整合動作且資訊技術部門將會花上大量的時間和金錢來讓這些介面運作正常。然而，技術無法解決此問題 – 它只是一個工具。對於一個成功的導入專案，我們首先要改變的是團隊成員的態度以及他們所依循的流程。

It Is A Cultural Project

這是一種文化專案

Culture: the totality of socially transmitted behavior patterns, arts, beliefs, institutions, and all other products of human work and thought. That is what the CRM implementation project is really trying to affect. The company needs to change its

culture around dealing with its customers. There is only one person that drives the culture of the company—the CEO. The CEO is the sole person that can drive a CRM project. He or she must define how to treat customer in every condition and ensure that the entire company lives that culture. Software is not a requisite to making this change. It requires leadership. Without painting the vision and leading your people to that better place, your CRM implementation will fail. The software only enables the culture. It allows you to share data from one end of the company to the other efficiently and accurately. It is only a tool and will just as easily (or with the same amount of difficulty) automate the wrong culture as it will the desired one.

文化：以社會化的方式所傳遞的行為模式、藝術、信仰、規定以及所有人類工作及思考相關產出的總和。這才是客戶關係管理導入專案真正要產生影響的對象。企業需要改變其對待客戶的文化。只有一個人能主導企業的文化 – 就是執行長。執行長是能夠主導一個客戶關係管理導入專案的靈魂人物。他或是她必須定義在任何情況下整個企業如何對待客戶並活在那樣的文化中。軟體並不是產生這種改變的必要條件。領導力才是。若沒有把願景勾勒出來並帶領您的團隊前往那迦南美地，您的客戶關係管理導入必定會失敗。軟體只能輔助文化。它能讓您從企業的這一頭到另一頭有效並精準地分享資料。它只是一個工具並且將理想的文化或錯誤的文化輕易地 (或是同樣困難地) 自動化。

It Is A CRC Project

它是一項客戶關係文化專案

CEOs need to take the CRM issue by the horns. Forget what your CRM vendor is telling you about how to implement it. They are only selling software to make their monthly quotas.

Rename the project the CRC Project—Customer Relationship Culture Project. You, the CEO, need to be the executive sponsor defining the culture. Each and every department in your company must be responsible for educating their people and implementing the new processes to support it. Only then can you look at how a software package is going to support it. It is all about a new culture. Oh by the way, you will get some software to help.

執行長必須擔負起客戶關係管理問題的權柄。姑且先暫時不管您的客戶關係管理廠商如何告訴您要怎麼導入。他們只不過是為了要把軟體賣給您並且滿足他們每個月的業績目標。

把專案名稱改成 CRC 專案 – 客戶關係文化專案。您，執行長，需要成為定義文化的執行負責人。企業內的每一個部門必須為教育他們的團隊負責並且落實新的流程來支持這件事情。只有這樣您才能再來看一個軟體工具將如何來支持這件事情。這完全是關乎一種新的文化。喔! 對了，您一定可以找到一些軟體工具來幫助您的。