

# EMC Strategy Roadmap for CRM

## Business Challenge

As marketplace competition across all industries continues to intensify, smart organizations are focusing on driving customer service and satisfaction, tailored marketing experiences, and efficiency in the sales process—all core components of a sound customer relationship management (CRM) strategy.

Executing on this strategy requires not only a solid technology base, but also a complete understanding of the people and processes across the business, from sales and marketing to operations and service—and the employees, partners, and customers that are involved in the processes. Because CRM is so often approached as a technology initiative, many IT teams struggle to successfully implement a CRM strategy that enables the business and produces a positive internal rate of return.

## Who should invest in CRM strategy?

Our experience has shown that companies have an acute need for setting and executing against a CRM strategy when faced with one or more of the following scenarios:

- **Fragmented CRM:** Your organization has multiple silos of customer management systems throughout the enterprise without a vision or plan of how to bring them together.
- **No Executive Sponsorship:** The team responsible for the success of the CRM project does not have a clear vision and unwavering commitment from an executive sponsor.
- **Process-Driven Organization:** Your organization has complex business processes that are disconnected and driven around a transaction (e.g., a sale, an order), not the customer.
- **Consensus Building:** Your organization is struggling with clarity around the value and priorities of CRM initiatives.

## Service Description

The EMC® Strategy Roadmap for CRM blends the knowledge of your business and technology teams to help you develop and prioritize CRM capabilities that align with your business strategy. This engagement is designed to help your organization quickly review high-level business requirements for customer relationship management and create the right implementation approach/plan for rolling out a solution. A CRM Strategy Roadmap includes the following components:

- **Alignment of CRM Strategy:** We work with your organization to document how your CRM strategy is aligned with and supports the overall business strategy.
- **Mapping of Business Processes:** Your organization's people and processes become the focal point of the CRM strategy work sessions. Using our process models, individuals from your organization model the information flows across the enterprise.
- **Generation of Prioritized CRM Initiatives:** Following the definition of business processes, a prioritized set of CRM initiatives is generated based upon your firm's business processes and technology capabilities.

The EMC Strategy Roadmap engagement starts by rapidly establishing the key success factors and priorities for your CRM initiative. Through additional interviews and scope definition meetings with key stakeholders, this vision is further evolved into a high-level CRM project charter that outlines a common understanding on the scope and essential requirements for the first phase of the project. By establishing this common baseline view of both functional and technical scope early on, the team creates the basis for decision making throughout the remaining phases and ensures that the foundational work is consistent with the ultimate business goals. This project charter document will not only define the initial phase scope, but will also help document the vision and approach for phasing and evolving integration capabilities over time to meet your end-state requirements.

The engagement concludes with a two-hour management debriefing session which will review the key summary findings from the assessment. The primary deliverables are:

- **CRM Implementation Roadmap:** What CRM strategies should be considered for supporting the organization's business strategy? How do the CRM strategies translate into tangible CRM initiatives for the organization? How should the CRM initiatives be prioritized? What are the most important success factors of the CRM initiatives?
- **CRM Project Charter:** What is the high-level functional and technical scope of the Phase I CRM initiative? What are the anticipated future phases of the initiative? What are the team and other organizational dependencies/issues/risks of the Phase 1 implementation?

## Summary of Benefits

EMC's approach to CRM has proven that setting a CRM strategy that examines people and process first and technology second provides a roadmap for success. Our CRM strategy produces the following key benefits:

- Alignment between business strategy and CRM strategy
- Involvement and buy-in from Marketing, Sales, and Service departments
- Documented business process models for customer, partner, and employee information exchanges
- Prioritized portfolio of CRM initiatives as determined by the business

## EMC Consulting

As part of the world's leading developer and provider of information infrastructure technology and solutions, EMC Consulting transforms information into business results. Our consultants bring a unique mix of industry, business, and technology expertise to solve today's toughest challenges. We use field-tested tools, proven methodologies, best practices, and industry standards to minimize risk and optimize time-to-value in our engagements. We provide a full range of consulting, design, implementation, and support services.



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