

## Customer Relationship Management Best Practices

1. **Evaluate customer information and management needs across all channels and departments.** Your CRM system is the center of your organization. It is touched by Marketing, Sales and Operations. Give it the attention it deserves. Successful Customer Management spans both your online and physical stores - from the CSRs to store sales associates, to warehouse employees.
2. **Creating a 360° view of the customer is difficult, but with the right CRM system, it's possible, and worth it.** Gathering all customer interactions, issues, orders and profile data across all channels is challenging. However, it enables great audience segmentation, customer behavior and lifetime customer value information to use to increase repeat buyers, convert one-timers into loyal customers and inform marketing investment strategies. In addition, if you have a loyalty program, it is important to connect it to your CRM system.
3. **Make sure your digital commerce customer data is integrated with order management.** If you are unable to collect 360° data about a customer via your CRM, then focus on integrating customer information with your order management system. When customers call to place an order, knowing what they purchased last is valuable information that your CSRs can use to up-sell, ask about their satisfaction, find accessories to match and update/validate contact information. All ending in higher customer satisfaction and sales.
4. **Work with marketing to make sure they can track campaign effectiveness through CRM.** Ensure that all of your marketing campaigns are tied into your CRM system and into your OMS tools so you can track effectiveness and ROI of your marketing efforts.
5. **Track cross-channel campaigns for full effectiveness.** Track same or similar offline and online campaigns and promotions individually. Evaluate how offline campaigns generate offline sales, how they generate online sales, and vice versa.
6. **Integrate with ALL your warehouse management, order management and email tools.** To get a full view of your customer, create audience segments and understand customer value - you need the full picture. Even just integrating these tools from the call center and ecommerce channels will help you to understand how to sell better online and personalize customer experiences. Adding other channels is even better, if possible.
7. **Ensure all the numbers from disparate systems tie together.** Analytics, your order entry system, your chat bots and your own lead tracking systems may define conversions differently. Double-counting (or non-counting) can completely skew analysis. Perform QA tests around data integrity across all of your systems – from CRM to database to ERP and ecommerce reporting.
8. **Use consistency in your analysis.** Ensure your CRM data, reporting and analysis are speaking the same language and utilize the same metrics across the board. For example, use the same denominator for calculating conversion, the same traffic metrics across analytics tools, and try to compare apples to apples.
9. **Identify metrics you can define and track.** CRMs can track many different metrics; all need to be considered. For example, which products or promotions work best with which customer segments? How many customers return after they have an issue with our product? How many sales did I get out of the last email campaign? Did it make money? What CSR metrics do you need to track to see if a CSR is doing well?

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# eCommerce Diligence™ Checklist

## CRM Key Questions to Ask Providers

### Company

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1. How long have you been in this business?
2. How many current clients are using your CRM system? How many have you lost, why and primarily to which competitor?
3. What size/types of clients fall into your “sweet spot”?
4. What peripheral or support services do you offer (e.g., eCommerce, custom development, training)?
5. What is your SLA for support issues?

### Products/Services

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1. Is your solution offered as perpetual licensed software or on-demand multi-tenant solution?  
**If perpetual license:**
  - a. What are the hosting requirements?
  - b. What should I expect regarding upgrades (cadence, timing and pain)?
  - c. Do you provide customization/implementation services?
  - d. Can a third party provide customization/implementation?**If SAAS/ASP:**
  - a. Do all tiers include maintenance and support?
  - b. How often are new features introduced?
  - c. What do I do if I need a feature you don't have or plan to have soon?
2. Where is your product's competitive advantage? Campaign management? Audience segmentation? Loyalty? Support? Flexibility? A particular vertical? Pricing? Don't say “all of the above”.
3. Do you offer a free trial? What's missing in the trial version?
4. What optional services do you provide as part of your solution (e.g., data integration, account management)?
5. How long does it take to implement the “out-of-the-box” solution? A sophisticated one?
6. What ROI should I expect from implementing your solution? How many years will it take to break-even?
7. What type of training do you provide to use your solution? Is there ongoing support available?
8. What skills does my organization (or hired third party) need to implement this platform?
9. What technical support services are available?
10. Do you have a support knowledgebase, community forum, or applications that are shared by customers?
11. Which third party product technology ecommerce platform providers have you worked with in the past?
12. How can I export data in the event I need to change platforms? How do I import to get started? How do I ensure I own and control my data?

### Features

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1. What key features are included in your solution?
  - a. What features are currently missing?
  - b. What features are on your roadmap?
  - c. What features does management love?
2. What is your product's competitive advantage over other packages (e.g., integration, ease of use, pricing)? Why?
3. Can I use your tool to segment my customers? By orders? Customer Data? Multichannel Sales?
4. Can I tie your CRM into my ECP, OMS, WMS and Multichannel Systems like POS, Catalog and Mobile Sites to track all customer interactions and orders?
5. How does your CRM integrate with other systems, such as OMS, WMS, ECP, POS, Data Warehouse, CDP, etc.?
6. Can I integrate your CRM with my email campaign management tool or does it have its own tool? If so, what features does the Email tool have?
7. Can my CSRs create their own emails based on my corporate email template?
8. Show me an example of your control panel/dashboard. Is it customizable?
9. If I buy your CRM, do I have to use your other modules (e.g., accounting, ecommerce) in order to get the most out of your features? What degrades if I don't?

### Pricing

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1. Do you price by the user, concurrent user, server, site, or other?
2. Why do I want to pay to upgrade to the next level?
3. How do you charge for annual support? What about maintenance?
4. Are there any additional fees (e.g., implementation, transaction costs, revenue sharing, training)?

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