How to turn Your CRM into an enterprise portal

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Data leading to customer insight is vital in today's competitive environment. This data is a powerful resource that should and must be shared across corporate departments to improve sales effectiveness and operational efficiency. With direct, real-time access to customer details, sentiment, product shipments, support calls, and payment histories, salespeople can nurture strong relationships, exploiting every up-sell opportunity and even assist with support and collection issues.

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More importantly, by not having to search for customer information, sales staff have more time to focus on what they do best ? closing business.

Since enterprise focus should be customer-centric, CRM is the natural glue to bind together all other business systems, such as ERP, WMS, HR, etc. However, making CRM an enterprise portal is not easy since it requires bridging systems and processes from different departments including sales, marketing, finance, customer support and logistics. This CRM portal becomes the single point of reference that combines all relevant customer-related information and presents it in a contextual framework that adds value and greater insight to the CRM user.

Like all large system integration projects there may be challenges including political conflicts, and many technical hurdles including implementation of enterprise mobility, cloud solutions and other advanced technologies. Follow these five tips to enhance your CRM implementation and provide your users with an excellent CRM portal experience that meets their expectations:

1. Bridge processes and data

Define an infrastructure that can profile, cleanse, parse, and standardize information across disparate data sources, applications, systems, and platforms. Create automated flows of information from CRM to ERP, call center, e-commerce, and other enterprise systems to ensure a full and complete view of customer histories, orders, credit status, service issues, and more. Remember to include the customer's world too: e-commerce interactions, social site interaction, Web site visits, email, messaging, etc.

2. Provide multi-channel access

While your goal may be to drive CRM adoption and use by achieving a portal status within the enterprise, do not forget that other systems remain important and need access too. Let authorized users of systems such as your collaboration platform see CRM information as well. Make mobile part of your strategy, including providing direct customer access where possible; using innovative technologies is another way to build customer loyalty and brand value.

3. **Keep an eye on the budget**

   A great CRM portal may "complete you," but management must keep an eye on the budget and costs. Keep the project focused on revenue optimization and let this priority drive project objectives. Work toward renewals and repeat business, service low-profit customers more cost effectively, etc. Include dashboards that summarize key metrics aided by CRM. Automate processes, such as the reporting of opportunities discovered during a service process directly to the salesperson who will actually close the deal.

4. **Define the process**

   The real purpose of CRM is to enhance customer experiences and thereby improve business performance. Listen to what your customers and internal stakeholders are saying when setting up CRM portal processes. Define all the business processes related to the customer, gain consensus among departments on who does what, and then optimize for operational efficiency; there are often disconnects than can be solved through system integration.

5. **Make information actionable**

   Make sure users can write to records and not just view them. If people feel that they can provide input and get real work done, it increases enthusiasm for the system and increases its impact on improving customer service and productivity.

Depending on your CRM system, different characteristics may lend themselves to an improved portal experience for your users. Newsfeeds or social status feeds such as Salesforce Chatter provide a corporate social dimension to the CRM portal experience. The CRM knowledge base can act as a document repository. Dashboards and reports provide summarized information on CRM data. Web Parts can mash up Web interaction such as shipment tracking, maps, and weather reports within the user's current view.

CRM analytics are leveraged in a portal to deliver the right information to the right user at the right time. Not all portal views are or should be equal. The Application Programming Interface (API) enables integration platforms or point-to-point programs to bring relevant data from customers, social sites, and other enterprise systems into the purview of CRM processes and portals.

Creating a portal experience requires an attitude shift that gives a CRM implementation true portal status. An optimized experience depends on your understanding of the extent to which these capabilities can be leveraged to create a positive experience for your customers and users. You know you've won the user adoption and portal challenge when your CRM system becomes the first and last application checked by your users every day.

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