



Collaborative CRM Workshop

05 Implementation & Measurement

Collaborative CRM Workshop – Agenda

Introduction to Collaborative CRM



Partner Alignment & Project Objectives



Segmentation & Scorecard



Strategy & Tactics Development



Implementation & Measurement



Project Scoping & Next Steps

- What are the key challenges facing the industry in Europe
- What is Collaborative CRM
- How can Collaborative CRM improve the industry dynamics and performance
- What are the personal opportunities for certification

- How do you identify and engage with the right Partner for Collaborative CRM
- What are the key decisions to make before working collaboratively
- How do you establish objectives, target benefits and project plan

- Collaborative Segmentation – How is it done
- How do you develop a pragmatic, valid Segmentation
- How do you establish goals which focus on the target Segment

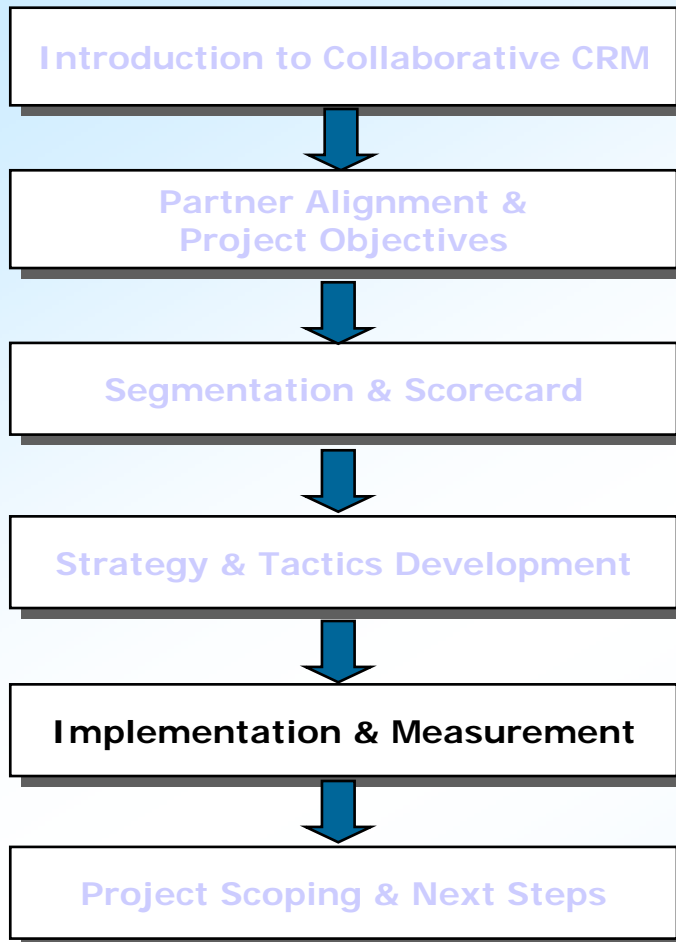
- What are the strategic options and how do you choose them
- What are the Tactical options for delivering the Strategies

- How do you plan effectively together to ensure the best implementation
- What are the key considerations for success
- What measurement criteria can you use

- Which 'real world' initiatives will be progressed
- What are the barriers to progress and how can they be overcome
- What is the plan & next steps to make them happen

Collaborative CRM Workshop

■ Implementation & Measurement Stage



Objectives

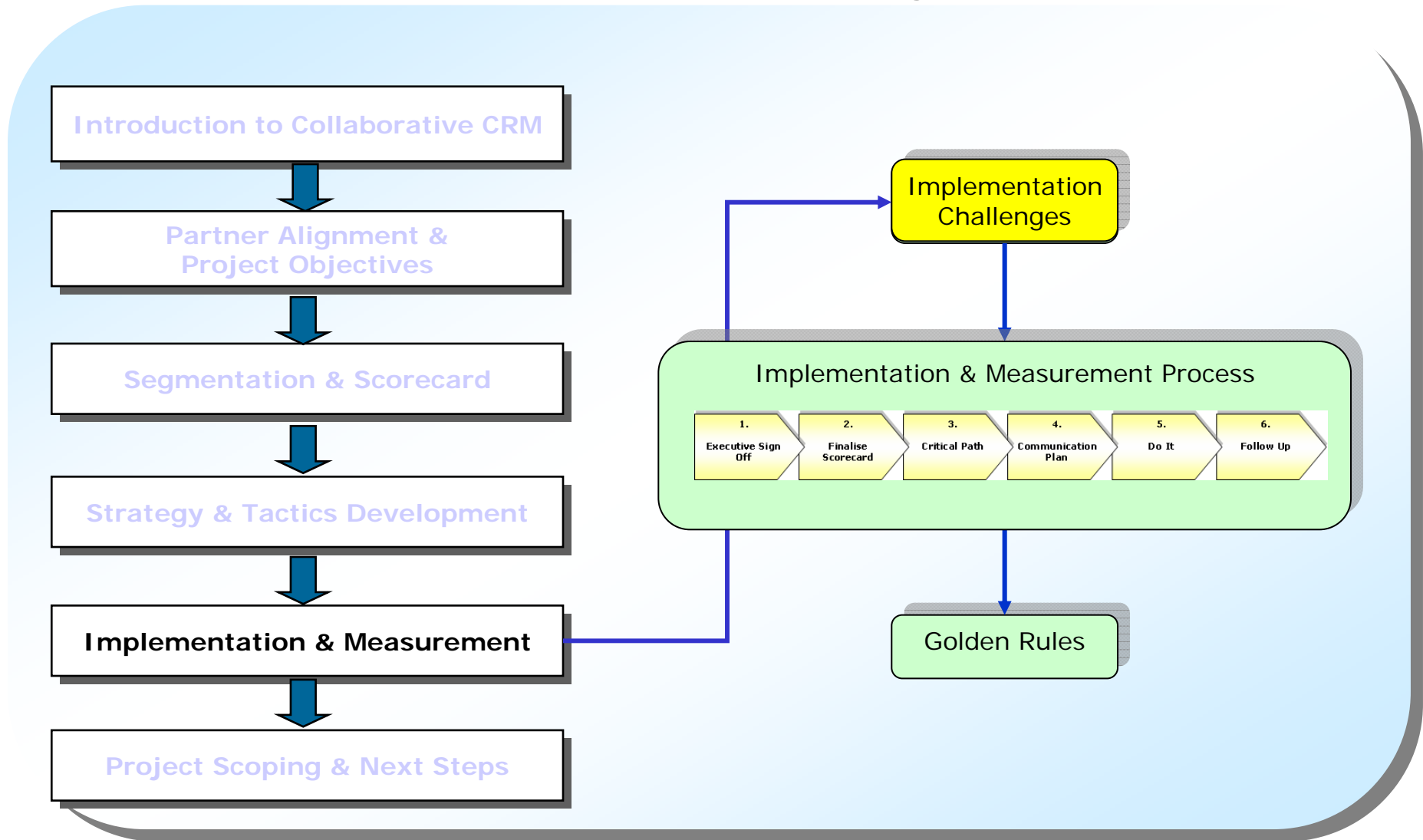
- To learn how to plan effectively to ensure the best possible implementation

At the end of this session you will..

- Understand the key areas to focus on during implementation
- Know how to build an Implementation & Communication Plan
- Understand a simple approach to measure under/over-performance

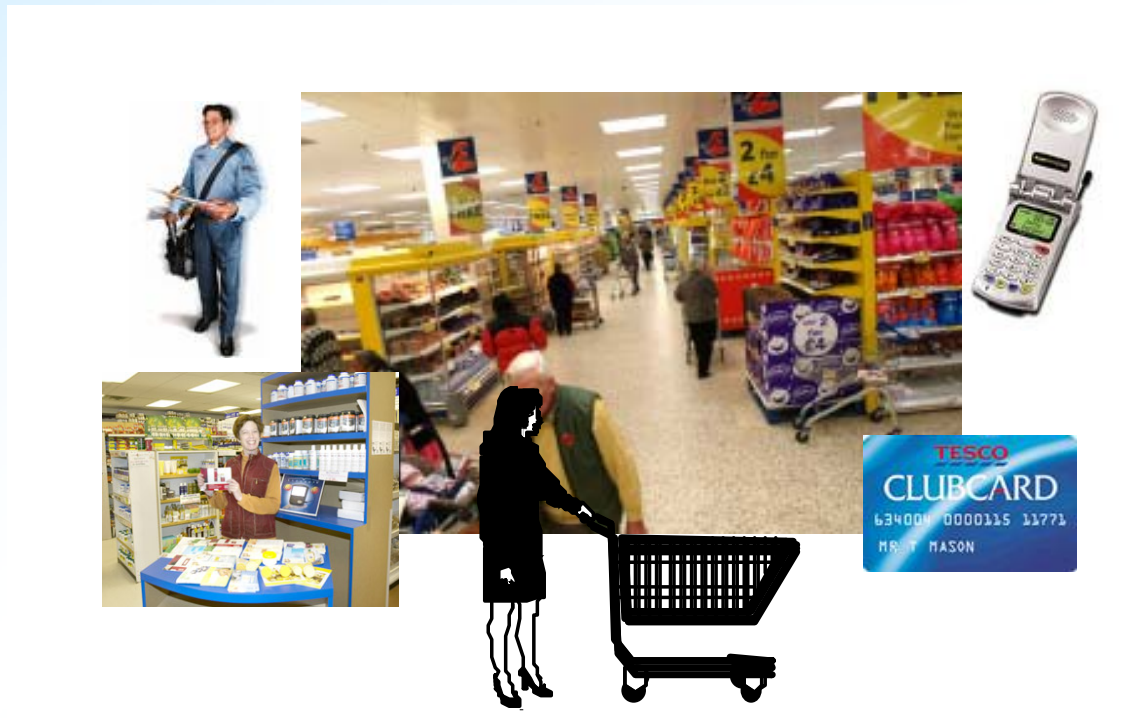
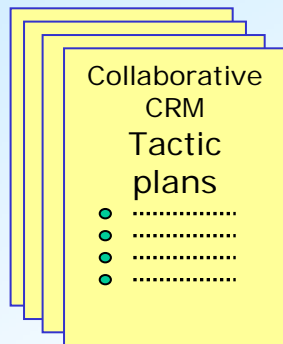
Collaborative CRM Workshop

Implementation & Measurement Stage



Implementation & Measurement

- What are the Implementation Challenges?



- What gets in the way of great implementation?

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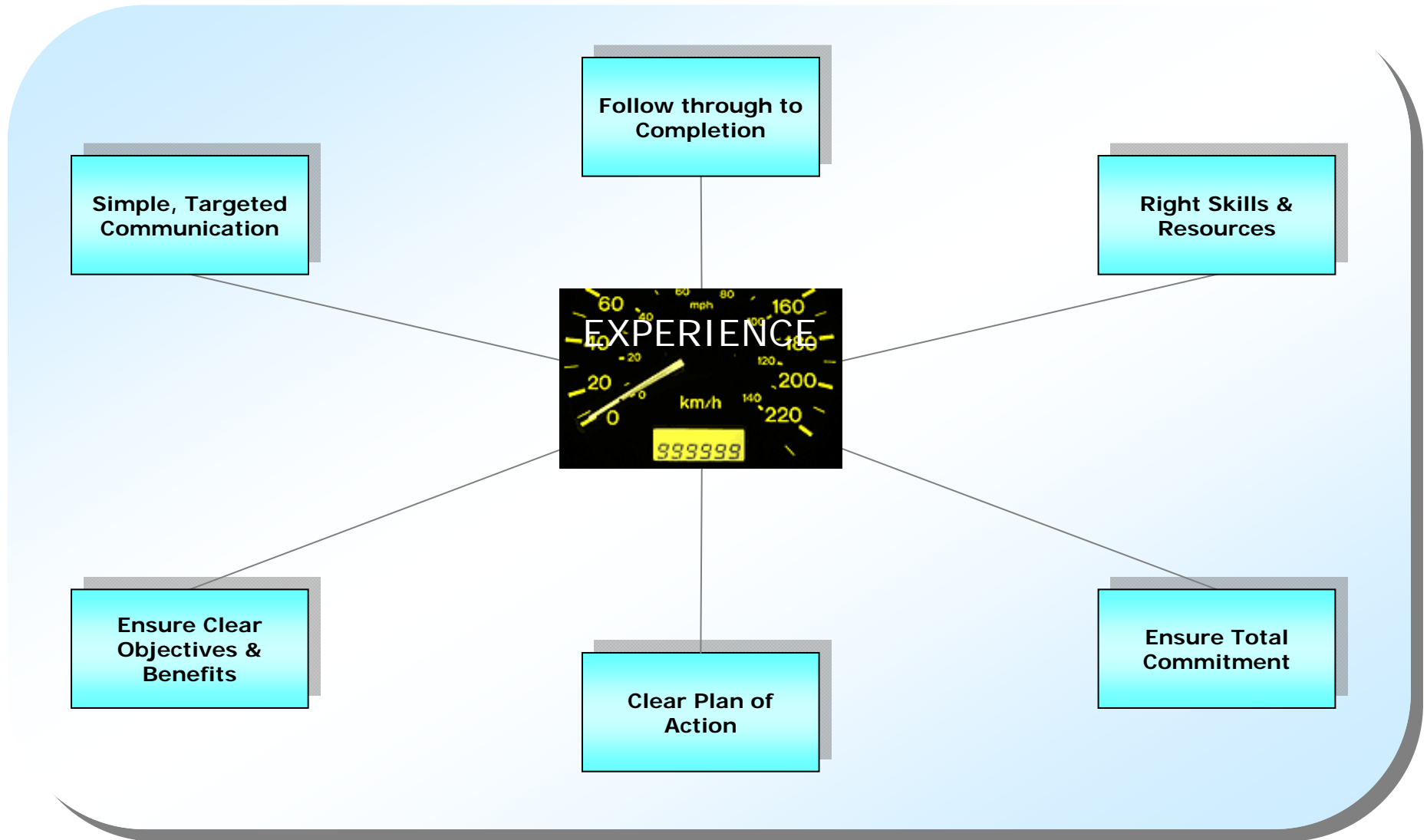
What are the Challenges Associated with Implementation?



- These are all things we can influence!

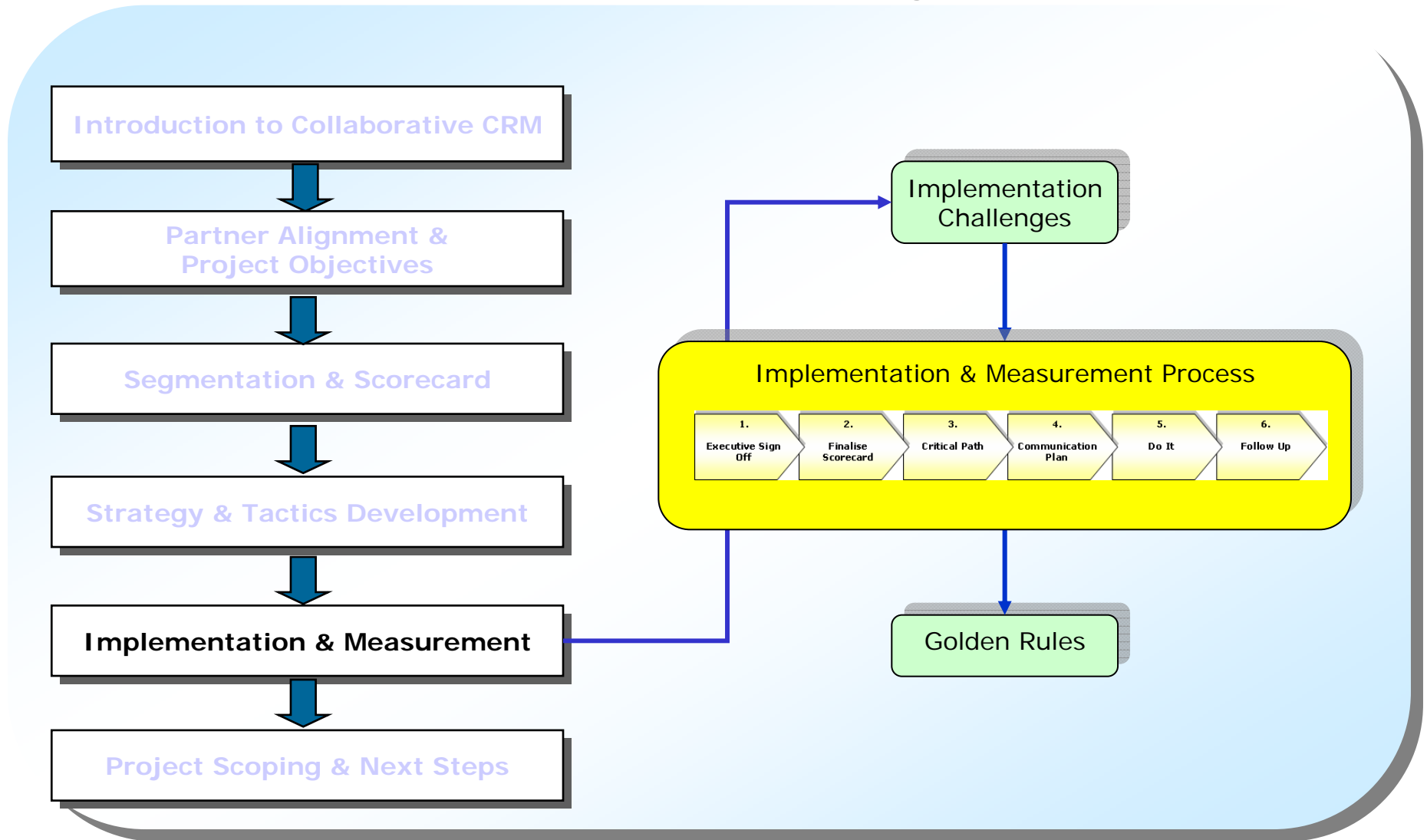
Implementation & Measurement

- What are the SOLUTIONS associated with good Implementation?



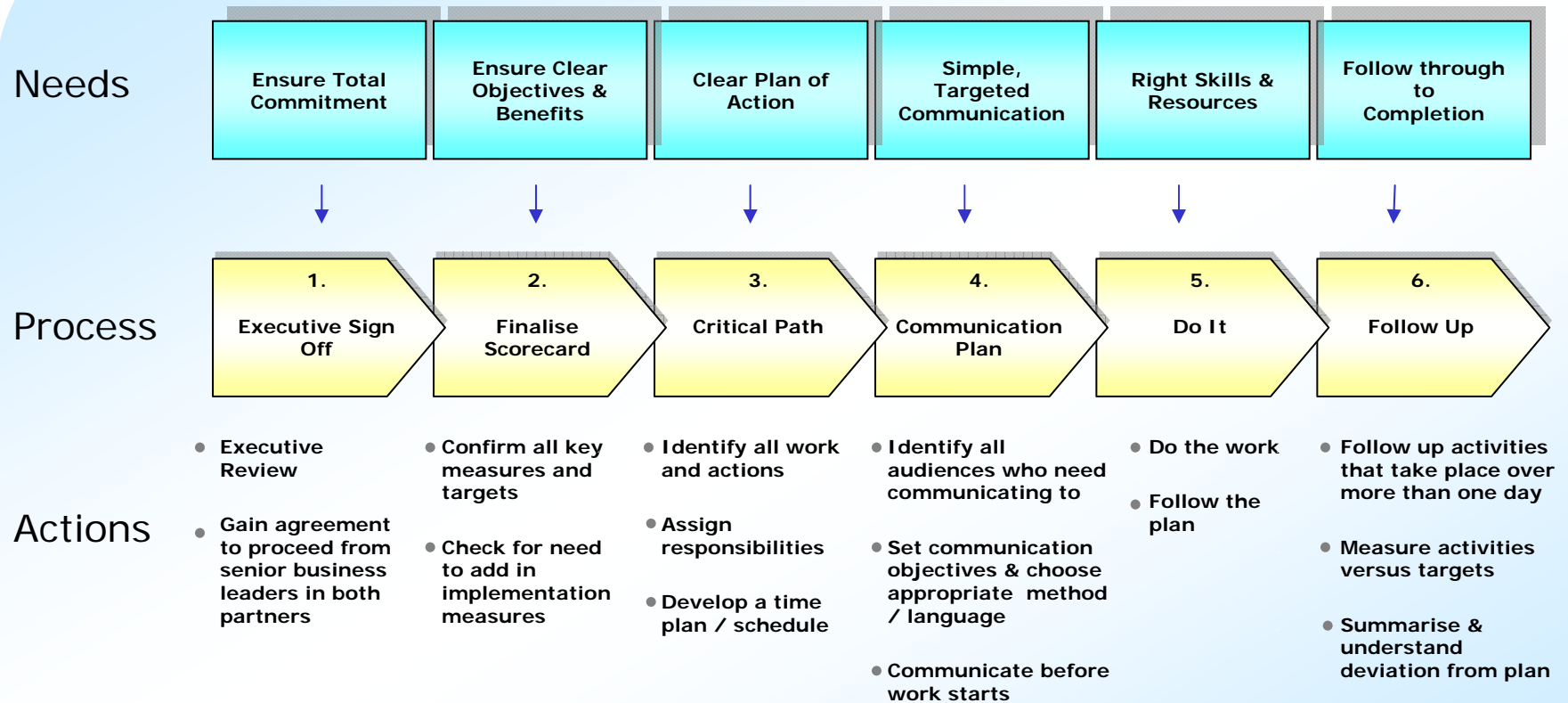
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Implementation & Measurement Stage



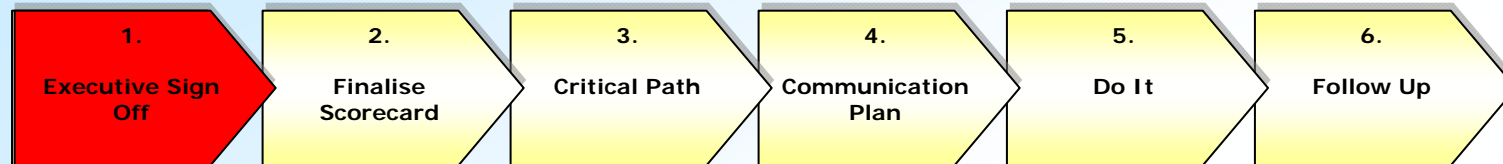
Implementation & Measurement

- How do we make it happen?



Implementation & Measurement

Implementation process: Executive Sign Off



Aim:

- ◆ Confirm buy-in from senior sponsors in both partners to ensure total commitment from all involved in implementation

How:

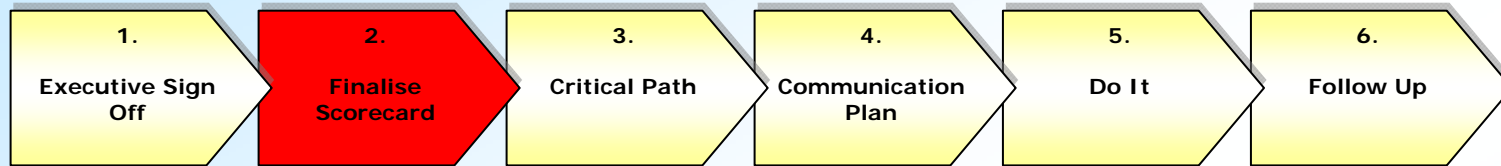
- ◆ Presentation / Executive Review
 - Summarise key elements of the plan
 - Explain how and if it differs from the original proposal
 - Explain what is needed to deliver the plan and the plans in place
 - Re-present the cost and benefits
 - Secure final agreement to proceed

Tools/Tips

- ◆ Ask sponsors to prepare an announcement e-mail or letter
 - used to reassure people involved in implementation that the exercise needs time and support

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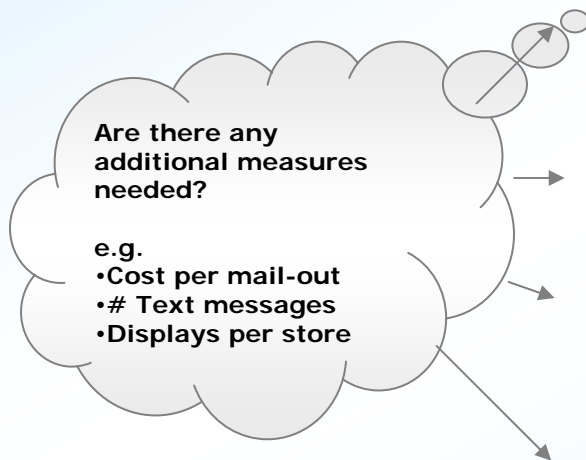
Finalise Scorecard



Aim:

- Review scorecard and check if supporting implementation measures are needed

How:



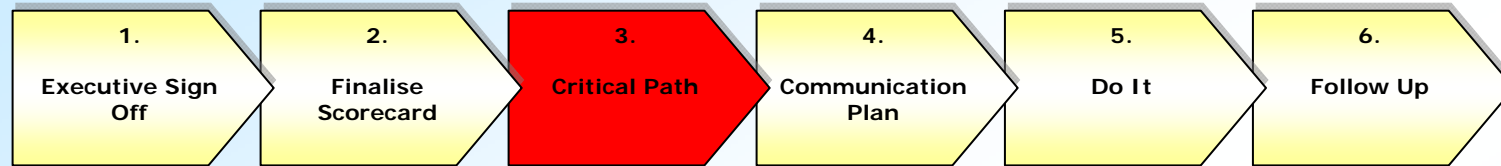
Collaborative CRM Working Proposal				
2. Segmentation & Scorecard				
2.4 Scorecard (One per segment initiative)				
Area	Measure	Current	Target	Timing
Shopper Behaviour (only one)	- Measure			
Share Of Market	- Retailer Share Measure - Manufacturer Measure			
Financial	- Retailer Measure - Manufacturer Measure			
C-CRM Effectiveness	- Measure 1			
Implementation	- Measure 1			

Check Questions:

- Do these align with the Working Proposal?
- Do they identify a (single) shopper behaviour change and an aligned business benefit?
- Are the Measures SMART?

Implementation & Measurement

Implementation process: Critical Path

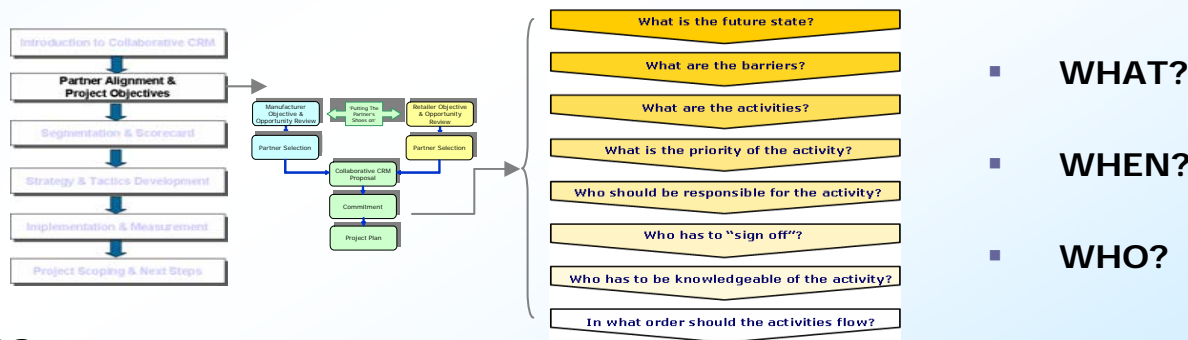


Aim:

- ◆ Create the detailed project plan with all actions, timings and responsibilities required to deliver against the scorecard and tactics plans

How:

- ◆ Use the project planning process again, as used in Partner Alignment



Tools/ Tips:

- ◆ Avoid plans that unnecessarily clash with obviously busy periods e.g. Christmas

Implementation & Measurement

- Implementation process: Critical Path

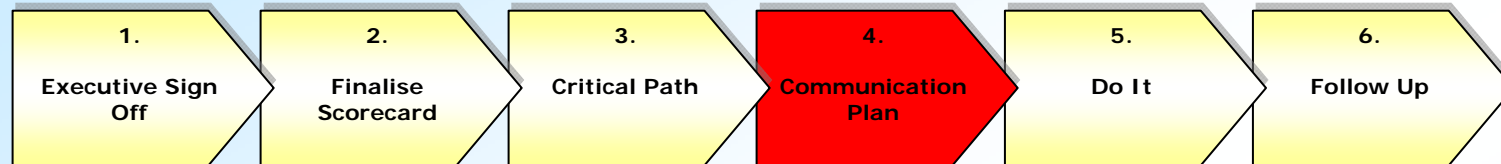
Example

#	What?	Who?	When?																	Other timing			
			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17		18	19	20
1	EXECUTIVE SIGN OFF	J. Brown / C White	█																				
2	SCORECARD FINALISED	J Brown / C White	█	█																			
3	COMMUNICATION PLAN																						
	Activity 1	F Smith			█	█	█	█															
	Activity 2	F Smith			█	█	█	█															
	Activity 3	C Watson				█	█	█	█														
4	STORE/HO CONSULTATION																						
	Activity 1	C Watson			█	█	█	█															
	Activity 2	C Watson			█	█	█	█															
5	MAIL-OUT PREPARATION																						
	Activity 1	G Rogers			█	█	█	█	█														
	Activity 2	G Rogers							█	█	█	█											
6	3RD PARTY AGENCY BRIEFING																						
	Activity 1	F Smith				█																	
	Activity 2	F Smith										█											
7	HEAD OFFICES BRIEFING																						
	Activity 1	J Brown/ C White											█										
	Activity 2	J Brown/ C White											█										
8	STORE BRIEFING																						
	Activity 1	F Smith													█								
	Activity 2	F Smith													█								
9	EXECUTION																						
	Activity 1	F Smith																					
	Activity 2	3rd Party Agency X																					
	Activity 3	3rd Party Agency X																					
10	REVIEW																						
	Activity 1	F Smith/ C Watson																				█	█
	Activity 2	J Brown/ C White																				█	█
	Case Study	J Brown/ C White																					End Quarter 2

Excel: 05 - Collaborative CRM Implementation Chart v1.1

Implementation & Measurement

■ Implementation process: Communication Plan



Aim:

- ◆ Create a plan to communicate to everyone involved in a way that fits their style of communication

How:

- ◆ Think through the critical path and make a list of all people who might have an impact on the success of the implementation
- ◆ Work out what you would like to tell or ask them
- ◆ Select the best way & right language to communicate with them

Tools/ Tips:

- ◆ Create a communication planning table (see next chart)
- ◆ Be creative but keep the way you communicate simple
- ◆ Use real life case studies to bring home the benefits/ possibilities
- ◆ Tell people what benefits this will bring to *them*
- ◆ Keep the Shopper in mind in every piece of communication

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- Implementation process: Communication Plan

Communication Planning Table – Example

Who do we need to talk to?	What do we need to communicate?	What Result do we want from them?	What's the benefit to them?	With what tools will we do it?	When do we need to do it?

Implementation & Measurement

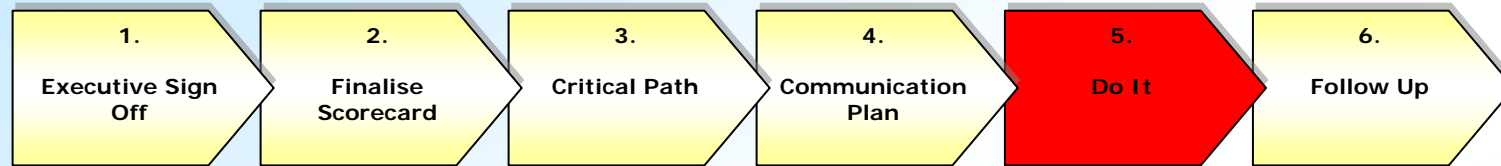
Implementation process: Communication Plan

Communication Planning Table - Example

Who do we need to talk to?	What do we need to communicate?	What Result do we want from them?	What's the benefit to them?	With what tools will we do it?	When do we need to do it?
Head Office Staff at Manufacturer & Retailers	<ul style="list-style-type: none"> Purpose Details Business impact Who is involved 	<ul style="list-style-type: none"> Buy-in Resource Feedback 	<ul style="list-style-type: none"> Business results Brand share/loyalty Reduced reliance on traditional mechanics 	<ul style="list-style-type: none"> Departmental meetings E-mail updates 	<ul style="list-style-type: none"> 12 weeks prior to in-store
Implementation Planners at 3 rd Party Agency	<ul style="list-style-type: none"> Activity overview What we want them to do 	<ul style="list-style-type: none"> Understanding Timings & quality Feedback 	<ul style="list-style-type: none"> Performance Incentives Future business 	<ul style="list-style-type: none"> Presentation Briefing Pack Suggestion forms 	<ul style="list-style-type: none"> Early for feedback 4-6 weeks prior to execution
Store Management and staff	<ul style="list-style-type: none"> Activity details Importance Sponsors What we want them to do 	<ul style="list-style-type: none"> Buy-in Timely and accurate action Compliance 'In-Stock' focus Feedback 	<ul style="list-style-type: none"> Business results Shopper loyalty Reduced reliance on traditional mechanics Incentives Senior Management recognition 	<ul style="list-style-type: none"> Regional Management meetings Store briefing pack Mystery shopper + incentive 	<ul style="list-style-type: none"> 12 weeks for feedback 2 weeks prior Mystery shopper during execution Feedback 2 weeks after
Field Sales Representatives from Manufacturer	<ul style="list-style-type: none"> Activity details Importance Sponsors What we want them to do 	<ul style="list-style-type: none"> Understanding Driving enthusiasm and interest Feedback 	<ul style="list-style-type: none"> Business results Senior Management recognition 	<ul style="list-style-type: none"> Regional Sales Meeting E-mail updates 	<ul style="list-style-type: none"> 12 weeks prior E-mails ongoing feedback before & after
Supply chain Teams at both partners	<ul style="list-style-type: none"> Activity headlines Importance Likely supply chain impact 	<ul style="list-style-type: none"> Buy-in & support Forecast adjustments etc 	<ul style="list-style-type: none"> Reduced reliance on Hi-Lo demand mechanics 	<ul style="list-style-type: none"> Include in HO briefings E-mail update 	<ul style="list-style-type: none"> In line with forecast cycle

Implementation & Measurement

Implementation process: Making It Happen



Aim:

- ◆ Do it! (On time, in full, as efficiently as possible)



Dos

- Keep the Shopper in mind at every step
- Use the right people to get things done
 - ◆ Scientists don't make great implementers!
- Anticipate everything that could go wrong and have a contingency plan

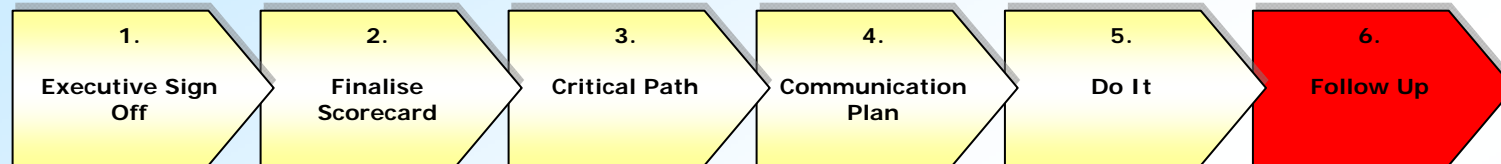
Don'ts



- Don't Miss €5 000 to save €500!
- Don't overlook the effect & impact of other activities

Implementation & Measurement

Implementation process: Follow up



Aim:

- ◆ To make sure that momentum is maintained throughout the implementation period
- ◆ To understand where implementation has deviated from plan

How:

- ◆ Ensure there is a plan to follow up all activities that take place over a period of time
- ◆ Review performance versus Score-Card
- ◆ Investigate & understand deviation from plan & record learning
- ◆ Review Communication Effectiveness
- ◆ Create a Collaborative CRM learning record

Tools/ Tips:

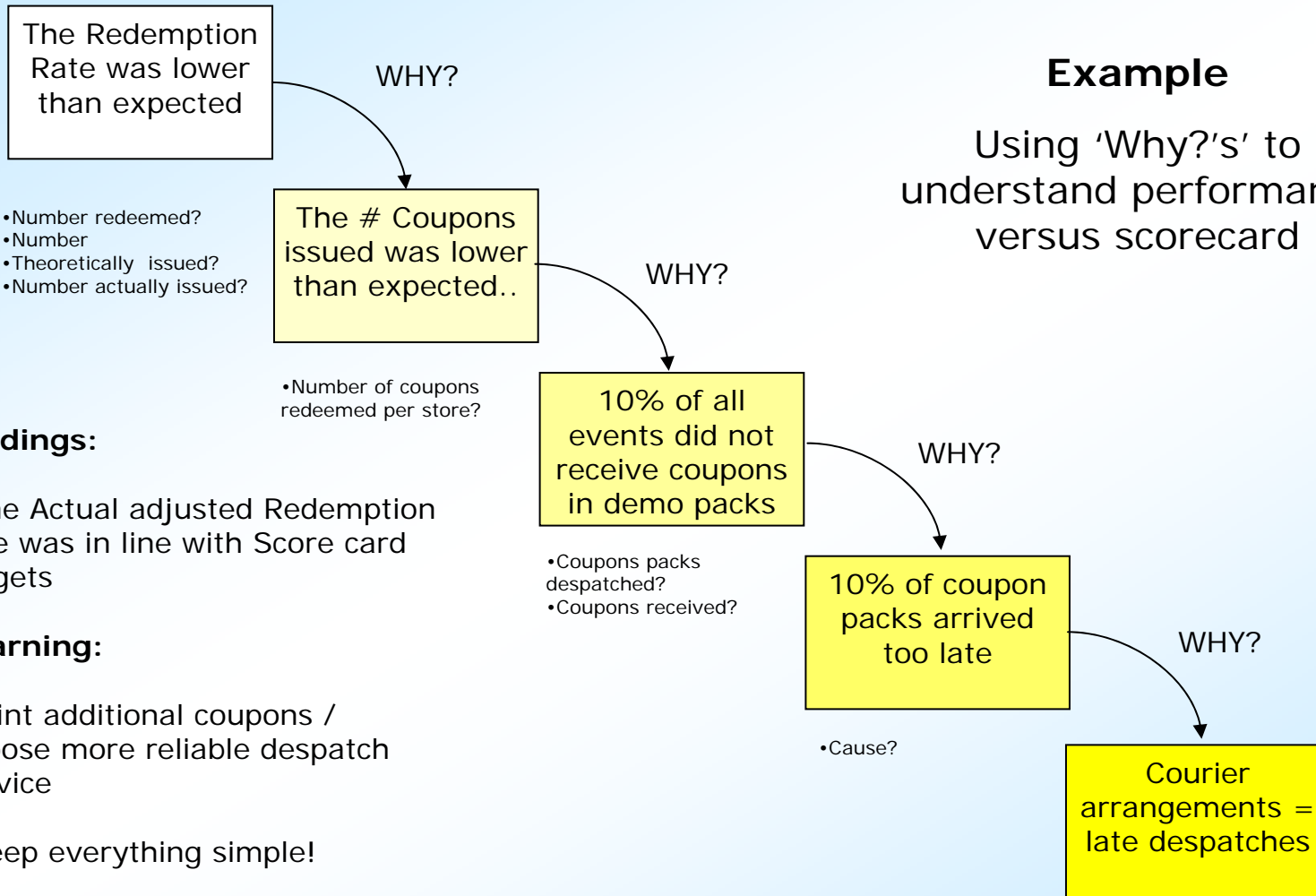
- ◆ Experience shows there should be extra focus on the first 4 weeks
- ◆ Use 'Why?s' to get to real practical learning

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Implementation process: 4 Why's??

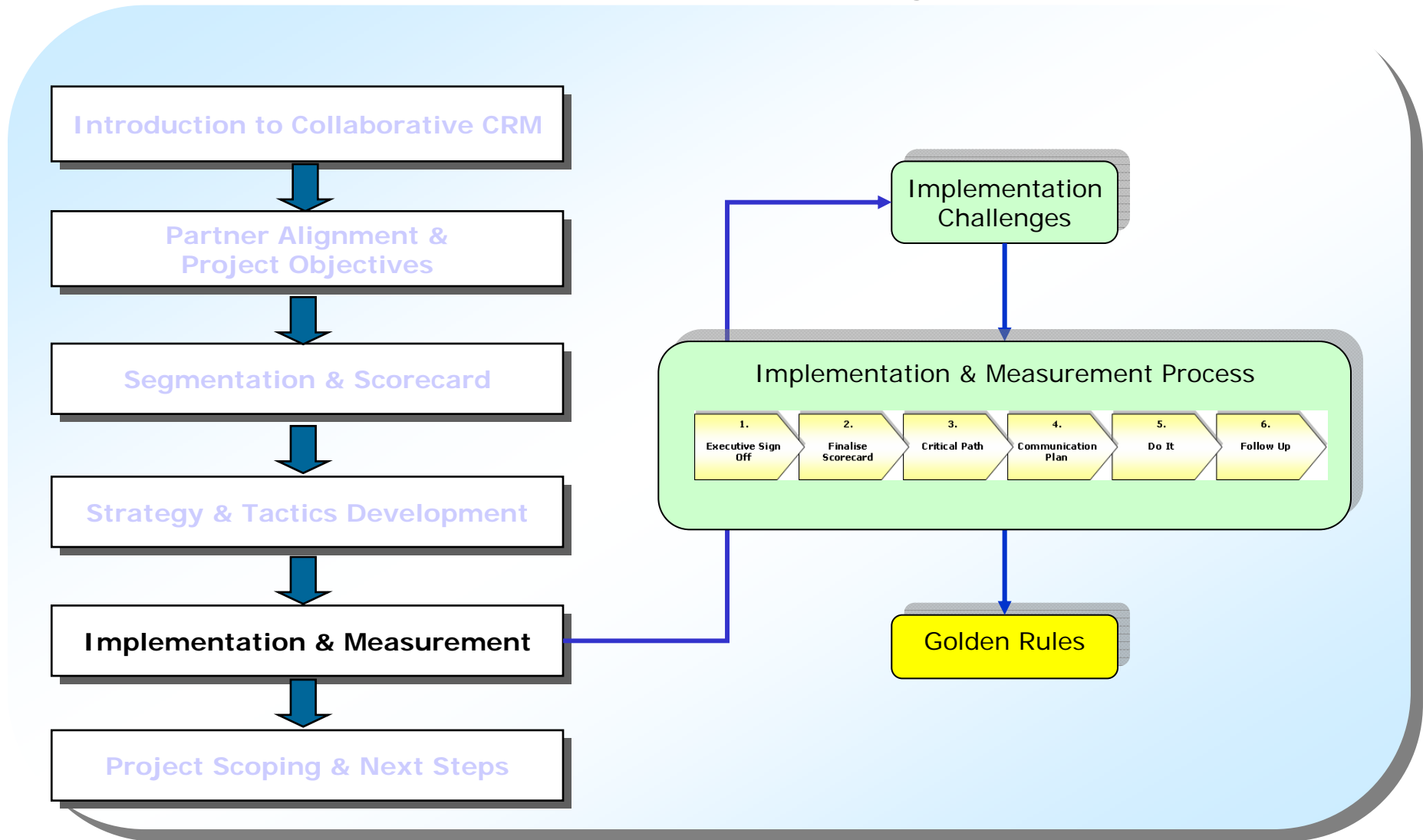
Example

Using 'Why?'s to understand performance versus scorecard



Collaborative CRM Workshop

Implementation & Measurement Stage



Workshop – Implementation & Measurement – 05

- **The purpose of this workshop is to understand;**
 - ◆ Some of your key implementation challenges
 - ◆ How you can use the new Content, Tools and ideas from the course to overcome them

- **Discuss within your groups**
 - ◆ What are the typical barriers to successful implementation of a Collaborative CRM project?
 - ◆ How can you use the Tools and Content from the course to overcome them?

- **Discuss and feed back to the group your findings**

Workshop – Implementation & Measurement – 05

Potential Challenge	How will we overcome them? How will we use the Tools & Content?

In Summary

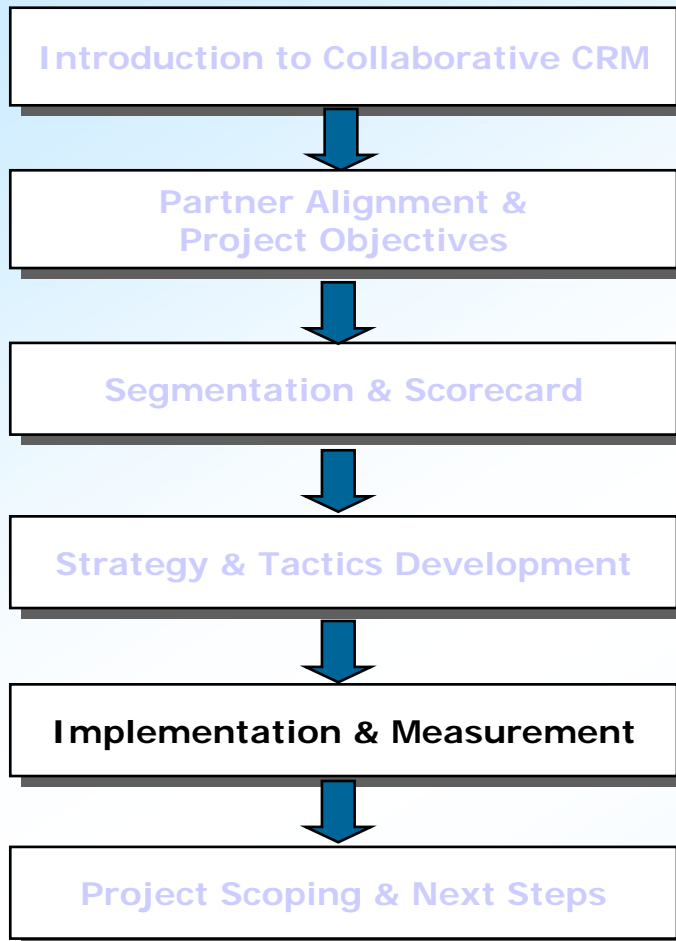


Golden Rules

- **Unless implementation leads to the right change in Shopper behaviour your efforts will be wasted**

Collaborative CRM Workshop

■ Implementation & Measurement Stage



Objectives

- To learn how to plan effectively to ensure the best possible implementation

At the end of this session you will..

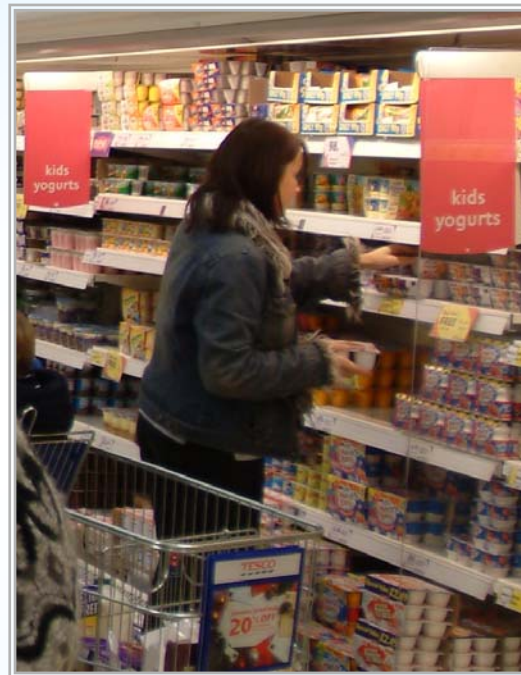
- Understand the key areas to focus on during implementation
- Know how to build an Implementation & Communication Plan
- Understand a simple approach to measure under/over-performance

Collaborative CRM

- The Million Euro Shopper Question!

Ultimately, will our Collaborative CRM plans result in a positive, loyalty building experience for the Shopper?

- Positive, loyalty building experience from a brand perspective?

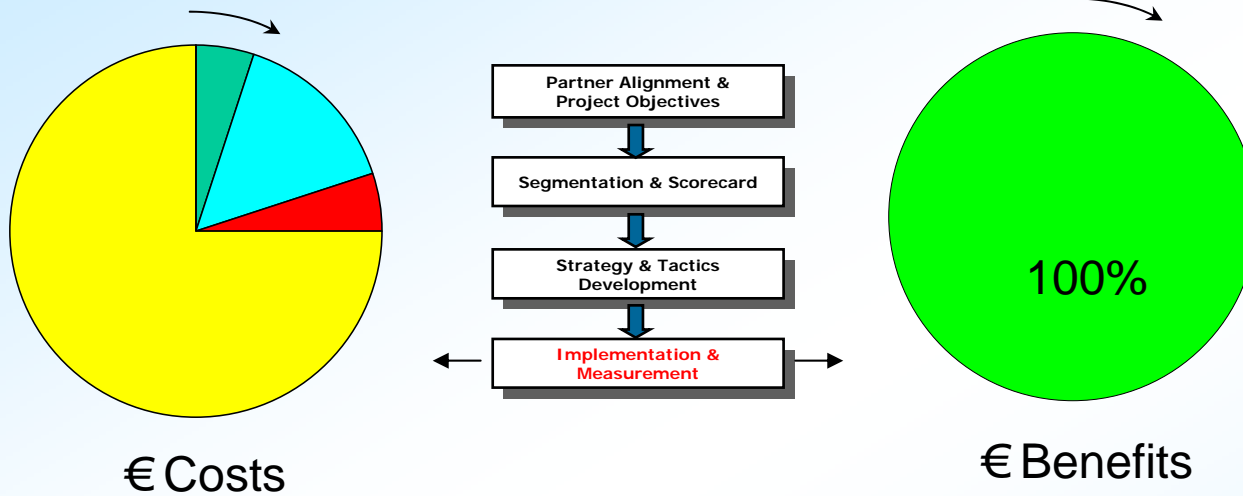


- Positive, loyalty building experience from a retailer perspective?

Collaborative CRM Costs v Benefits



- Where do they occur and what are the implications?



- Costs build throughout the process but there is no real business benefit until the end of the process!
- Check to ensure plans deliver against scorecard objectives at every stage
 - use the budget planner to estimate costs v benefits

Collaborative CRM Budget Planner										
Costs										
Category	Item	Unit	Rate	Quantity	Cost	Notes	Category	Item	Unit	
Implementation	Partner Alignment	Day	100	10	10000		Benefits	Revenue Increase	€	
	Segmentation	Day	100	10	10000			Customer Retention	%	
	Strategy Development	Day	100	10	10000			Operational Efficiency	%	
	Implementation & Measurement	Day	100	10	10000			Customer Satisfaction	%	
Total Costs					40000		Total Benefits			

Budget Planner