THE 5 KEYS TO SUCCESSFUL CRM CHANGE

INSIGHTS FOR TODAY'S CUSTOMER-CENTRIC TRANSFORMATION

The ability to better leverage customer insight & engage with newly empowered consumers is what separates the leaders from the laggards. But why are so many organizations so bad at it?

Senior Management Attitude on CRM

36% HIGHER GROWTH ORGANIZATIONS VIEW CRM AS STRATEGIC

32% LOWER GROWTH ORGANIZATIONS VIEW CRM AS TACTICAL

High growth companies focus on these CRM fundamentals **on average 2x more than low growth companies**

- 2x Information
- 2x Insights
- 2x Optimization
- 2.5x Targeting
- 3x Measurement
- 3x Agility

SUCCESSFUL CHANGE ~~NEEDS~~ REQUIRES LEADERSHIP

The basis for successful CRM lies in the 5 keys below. This list is not exhaustive of every change practice but is focused on the key areas that represent both the greatest struggles and most promising opportunities for organizations.

Companies Who Delivered Change

LARGELY OR TO A GREAT DEGREE **75%**

SOMEWHAT OR HARDLY AT ALL **25%**

1 KEY ONE CHAMPION THE CAUSE

Permission Is Not Sponsorship

How sponsorship aligns leaders, engages decision makers and goes beyond permission to evangelize material change.

LARGELY OR TO A GREAT DEGREE **34%**

SOMEWHAT OR HARDLY AT ALL **66%**

Companies Who Failed at Change

2 KEY TWO SHOWCASE THE NEW CUSTOMER VISION

Seeing Is Believing

How open communication brings the customer vision to life, makes it easy for people to understand at all levels and sets the stage for the operating changes to come.

Companies Who Failed at Change

LARGELY OR TO A GREAT DEGREE **21%**

SOMEWHAT OR HARDLY AT ALL **79%**

Companies Who Delivered Change

LARGELY OR TO A GREAT DEGREE **65%**

SOMEWHAT OR HARDLY AT ALL **35%**

3 KEY THREE COME TO TERMS WITH CHANGE AND YOUR COHORTS

Choose Clarity Over Certainty

How a new operating approach brings clarity to changes in decision making and day-to-day activities and helps people at all levels accept the shift.

Customer Strategy | Financial Management | Infrastructure | Experience Delivery | Organization

COMPANIES WHO DELIVERED CHANGE 62% Came To Terms To A Great Degree With The Operating Approach

VS.

COMPANIES WHO FAILED TO DELIVER CHANGE 21% Came To Terms To A Great Degree With The Operating Approach

4 KEY FOUR COMMIT TO THE PLAN

Assignments Are Not Commitments

How planning and financial commitment crystallize the pace for change, secure budget and P&L owner accountability, and keep everyone focused on the journey to the prize.

COMPANIES WHO FAILED AT CHANGE **22%** LARGELY OF TO A GREAT DEGREE

COMPANIES WHO DELIVERED CHANGE **66%** LARGELY OF TO A GREAT DEGREE

5 KEY FIVE UNAPOLOGETIC EXECUTION

Stop Debate. Execute!

How project leadership navigates through challenges during implementation, sustains broad support through the hard periods, and proves the value along the way.

COMPANIES WHO FAILED AT CHANGE WERE APOLOGETIC

LARGELY OR TO A GREAT DEGREE **25%**

COMPANIES WHO DELIVERED AT CHANGE WERE UNAPOLOGETIC

LARGELY OR TO A GREAT DEGREE **62%**

MERKLE

While there's no shortage of studies and perspectives, we wanted to know what works. In the first half of 2013, Merkle launched a comprehensive study of more than 350 leaders within large US enterprises to discover what makes change succeed or fail in CRM.

Read the full Executive study, Customer-Centric Transformation: Five Keys to Leading Successful Change and learn more at **merkleinc.com/transformation**