

## **Making The Case For CRM Certification**

### **Abstract**

This article cites the need for a more expansive set of CRM Best Practices than has historically been considered in the industry. The basis for this recommendation is statistical research that has correlated specific actions with the achievement of business success. One method for proliferating this knowledge is to create a certification program that would address both the historical implementation best practices as well as concepts identified in the research. A topical outline is provided for such a certification process. The reader is encouraged to review this article and content and respond to a survey that will determine whether this site will offer this type of certification. You are encouraged to invite your peers and counterparts to weigh-in on this important issue.

### **Background**

The IT industry has an abundance of certification programs and in fact certification is often used as a litmus test for being considered for a job interview. Despite the widespread use of certification for hiring purposes, there have been many articles that have challenged the validity or utility of this approach to decision making. Basically what is being asked is whether there is a correlation to success on the job with these criteria such that it can effectively be used as a go/no-go decision. So to make the case for a CRM certification, one has to start with defining a purpose for its creation and associate the content with criteria of success.

In the past, this writer has authored, co-authored, and presented training materials in the CRM space that were positioned as certification in a specific area of implementation. These seminars tended to attract a high percentage of consultants and wanna-be consultants who desired insight regarding the technology and some credentials that would help them qualify for projects. There is nothing intrinsically wrong with fulfilling this need; but is this objective consistent with the current needs of the industry based on the maturity of the products and services available within the CRM community of vendors?

The CRM industry continues to grapple with defending its relevance (value-add) and cost in a market where technology increasing looks like a commodity. Vendors as well as analysts are grasping at straws to gain mind share of the user community by suggesting that the next great innovation is right around the corner. Meanwhile, senior management within the end-user ranks are so turned-off with the hype that they do not want to even hear the term CRM. Yet the challenges for these end-user organizations continue to build and CRM is a viable component of potential solutions but the disconnect is expanding. Clearly, what we have here is “a failure to communicate” (and a failure to deliver on promises).

Though the purpose of this article is not to re-hash the past, the history of CRM is relevant to understanding how we got to this position. In the evolution of any new technology, vendors must have customers to provide cash flow to fund that evolution. This process tends to produce many challenges in terms of misplaced expectations; this mismatch translated into many failures which always fuels generalizations as to best practices etc. In some cases, there was a clear case of failure of the technology whereas in other cases there were gross errors in implementation. Therefore, the industry does not need certification with regards to knowledge of the technology; what is needed is how to generate meaningful results. Everyone wants the end user organization to be successful, but the responsibility for success is to great extent resident with the end user organization. What is needed from a vendor and end user perspective is a shared understanding of how to derive business benefits and establish complementary expectations.

### **Best Practices: Opinion Versus Fact**

Over the last five years there have been several statistically based studies that have linked CRM success (tangible financial benefits) with user organization actions. The statistical approach essentially removes the bias of identifying best practices on the basis of services that one offers or some characteristic of one's software. These studies support the following conclusions:

1. The classic best practices for CRM implementation that have grown up with the industry **are not correlated with success**. Now lest you have an immediate heart attack, this conclusion needs clarification. What the studies say is that these steps alone do not guarantee success; what that implies is that other actions, in addition to the classic best practices are required to achieve tangible success. In mathematical terms, one would say that the classical best practices are necessary but not sufficient to generate business success.
2. Elements of organizational leadership and change management are necessary to leverage implementation best practices to achieve success.

There are those in the industry and the end user community that would claim that the benefits of CRM are largely intangible and therefore beyond measurement as referenced above. This is true if one operates in the realm of defining CRM in the context of vague terms such as *customer centricity* and *loyalty*. In the writer's opinion this is a cop out for not dealing with CRM on an operational basis and is a virtual guarantee for wasting the organization's investment.

In summary, statistically based research has demonstrated that if organizations desire to achieve tangible business results from CRM, they must look beyond the classic Best Practices currently espoused by the industry. The classic disciplines

are positive but achieving business results is associated with making CRM operational. Thus, there are in essence, two sets of Best Practices that must be accounted for.

### **Setting The Perspective**

If the purpose of CRM certification is to help user organizations to identify what is required to achieve success, then what should be the focus of the content? The following comments offer a perspective on the logical target audience and content given an end objective of achieving measurable success from a business performance perspective:

#### End User Organization Participation

Obviously vendor staff and end user leadership must be on the same page relative to how design, implementation, and support will be accomplished. However, experience has shown that business success in the context of major systems initiatives is not correlated with situations where the user organization turns over the keys for the project to a large consulting firm. This does not infer that the consulting firm is the problem here; the issue is that the user organization has to **own** the solution. This means that the certification must focus on the end user community and foster the development of mutually productive expectations among consultants, vendors, and the customer. An important distinction is that this certification would be centered on achieving business success through the implementation process as opposed to adding an acronym on one's resume or business card.

#### The Target Role

Certainly the certification should apply to anyone involved in the implementation of CRM technology. Given that CRM is implemented in phases and that the emphasis is on achieving business success, the target role and certification should be specific to CRM Program Management.

#### Objective of the Certification Program

The purpose of the program is to improve the track record for achieving demonstrable business results.

#### On-going Feedback

It would be highly desirable to match the quality of adherence to the best practices as espoused by the certification content to actual results. However, at this stage, this ability must be viewed as a future capability.

### **Linking Competency to Content**

For purposes of this discussion, it is not practical to generate a detailed syllabus; the outline in this article is intended to provide a reasonable overview of the topics such that the reader can make an informed assessment of the appropriateness of the content and the value of the certification.

## The Syllabus

Certification can be presented in a classroom, seminar format, a workbook, an on-line program, or some combination. As a frame of reference, it is perhaps easiest to relate to a seminar context when describing time allocation; therefore, the various modules associated with certification will be described as Equivalent Seminar Days (ESDs). In an on-line format, the student would work at his/her own pace but the content would be equivalent to the ESD as indicated. The modules are set up in a logical sequence that corresponds to a five day seminar with an exam at the end that would be linked to certification as a CRM Program Manager. One could envision having the ability to purchase training within a given module but the modules would not have separate certification levels or designations.

Module One: Introduction to CRM	ESD=1
➤ Creating a meaningful definition for CRM	
➤ Elements of the technology	
➤ What is correlated with achieving measurable success?	
➤ CRM as an Operational Strategy	
➤ Implementation Best Practices: Overview	
➤ Operational Best Practices: Overview	
➤ Overview of the implementation process	
➤ The CEO and CRM	
➤ Establishing the Program Charter and project staffing	
Module Two: Needs Assessment: Concepts and Tools	ESD=1
➤ Overview and objectives	
➤ Identifying the key processes	
➤ Linking processes with organizational objectives and metrics	
➤ Elements of process analysis	
➤ The world of sales, marketing, and channel management	
➤ Dealing with the sales environment	
➤ Establishing end user ownership and commitment	
Module Three: Defining Requirements and Vendor Selection	ESD=1
➤ Linking functional and process needs to system requirements	
➤ Translating requirements into vendor capabilities	
➤ Creating the RFI/RFP	
➤ The vendor selection process	
➤ Setting expectations	
Module Four: Program and Organizational Change Management	ESD=.5
➤ Roles and responsibilities	
➤ Managing timelines and scope	
➤ Documenting decision making	

➤ Communication needs
➤ Ensuring organizational support for end users

Module Five: Building the Business Case	ESD=1
➤ Typical sources of CRM benefit: tangible and intangible	
➤ Calculating the total cost of ownership	
➤ The metrics of capital project approval	
➤ A ROI model and metrics of success	
➤ Assembling and presenting the business case	

Module Six: A Best Practices Assessment	ESD=.5
➤ Review of the certification content	
➤ Elements of the Best Practice Assessment	
➤ The need for post implementation assessment	
➤ An assessment of readiness	

Module Seven: CRM Program Management Certification	ESD=0
➤ Multiple choice certification exam	

Certification: Deliverables	
➤ Workbook and slides that pertain to each module	
➤ Exercises to increase understanding and skill development	
➤ Excel based ROI model and workbook	
➤ Best Practices Assessment and Workbook	

### **Translating Knowledge Into Action and Results**

Certification, by itself, is not going to generate a change in the frequency in the successful deployment of CRM. There is an enormous component of leadership that must be addressed. Organizations must establish a clear definition for success and then manage these implementations toward these goals. End user organizations have to work smarter to set effective accountabilities such that vendors, consultants, and the users of the CRM product pull together and deliver on their promises.

### **About the Author**

**Glen S. Petersen** is an internationally recognized speaker, writer, practitioner, and thought leader in the CRM and e-business industries. As a visionary and early adopter of sales force automation (SFA), in 1986, Petersen led one of the first successful national implementations of SFA in the United States. He has held senior level management positions with system integration and end user organizations. As a consultant, he developed a number of proprietary facilitation

techniques to help organizations to better understand technology, and how to rally around a single threaded, phased implementation approach. Prior to founding GSP & Associates, Petersen was senior vice president at ONE, Inc. and Ameridata. He has authored six books including *CRM Leadership and Alignment in a Customer Centric World* and *Making CRM an Operational Reality*, on which this series of articles is based. He also offers a ROI calculator that helps companies build a business case for CRM. It is available at [www.competitiveperformance.com](http://www.competitiveperformance.com).

Petersen has a Bachelor's and Master's degree in Engineering, and an MBA from the University of Chicago (US).