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**CRM Empowering IT: Part 3/3**

You often see customer relationship management software in reference to business outreach and customers however it's useful for IT operations too. I was interviewed this year on this topic. As with most 3<sup>rd</sup>-party interviews, parts are summarized and truncated. There's value in sharing the full answers to their questions so I'm providing my "director's cut" [giving you my full answers] in a 3 part series. This will provide a practical overview roadmap.

I welcome your comments, suggestions, and questions here or send me an e-mail, [sibaraki@cips.ca](mailto:sibaraki@cips.ca).

Thank you,  
Stephen Ibaraki, FCIPS, I.S.P.

**Part 3/3 Questions:**

**Continued from Part 2/3: How can CRM software making work easier for IT staff? What benefits can it bring to them, in terms of greater productivity, ease of use, more manageability? What issues or pitfalls does CRM software help an organization overcome?**

Let's examine this more closely keeping in mind that the work flows here are all processed automatically with CRM —no duplication and missed opportunities, no delays.

In IT, support requests such as to the help desk are put into queues and routed to the appropriate person based upon the right skill set. This request could be by phone or even as simple as an e-mail to [help@itsupport](mailto:help@itsupport), an internal e-mail address for support requests. These e-mails are parsed for content, a service ticket generated and placed into a queue, where it's routed to the Jim in IT for servicing. He has an immediate spot in his schedule and he has the right skill set. It's all automatic and the CRM system avoids cutting, copying, pasting of this information to have the problem serviced. There's a considerable improvement and streamlining of the process. There also benefits in other areas. Employees are serviced faster, they are more productive, the overall company atmosphere is one of "can-do" and collaboration working together to get the job done. This can amount to a 15-30% increase in overall operational efficiency.

Companies also employ employee portals for self-service. As an employee, when Susan has a problem with her financial reports, she can browse the portal and log her trouble ticket which is automatically placed into a queue for servicing and routed to the IT staff person, Tom, with the expertise in financial systems. The trouble ticket is resourced as a task in Tom's task list. And to simply matters further, the service job is automatically assigned in Tom's Outlook [e-mail client] task list. It is something he uses everyday and looks at continually. Process streamlining exemplified! There's no duplication of effort, silos of data, no losses in processing, and employee time is maximized: through the employee self-service portal, Susan logs her trouble ticket which is input into the CRM system for handling. Overall operating costs for the company is managed since the number of support personnel dedicated to this function is reduced by more than 10%.

There are many common IT tasks such as setting up a new computer account from a recent hire. This involves creating a user with the proper access rights and placing that user into the proper user groups in the computer system. This process can again be automatically assigned to the IT staff through the CRM system. If it's Mary's role to add new accounts, then a new hire will trigger a task in Mary's Outlook task list.

Regular maintenance can involve periodic servicing of company mission-critical servers to add updates, service packs and even perform scheduled reboots (restarts) to increase their stability. Preventative maintenance is suggested for all hardware devices. Software and hardware upgrades also need to be scheduled. Without this process managed in a structured way, you have the unaccounted failures that are crippling for companies today. Company agility and keeping to strategic initiatives is keyed upon a healthy, well-maintained IT infrastructure. Moreover IT governance is critical to corporate governance. There must be tight integration and communication between corporate and IT governance and having a reliable IT infrastructure is the key to this. In my interview with Dr. Marco Iansiti, David Sarnoff Professor, at Harvard Business School, he also talks about technology as a key strategic enabler where companies become keystones or Hubs dominating their markets and gives multiple examples. For example, Wal-Mart is the Keystone of a business ecosystem built upon well-managed technology. Warren McFarlan, professor emeritus at Harvard Business School produced a paper which introduces tighter integration between IT and corporate governance. This is essential for companies to stay competitive and especially when operating in offensive strategic mode.

A good CRM system ensures that ball is not dropped for the healthy upkeep of the IT infrastructure. Regular IT maintenance tasks can be automatically scheduled and assigned to the correct people. Work flows are clearly defined so stoppages are prevented—there are no breaks in the system. If there is a process failure, the management is notified, and policies can be changed to continually improve efficiencies.

So a good CRM system offers service scheduling, dispatching based upon available times of the IT staff, and avoids duplicate or conflicting scheduling. As an example, you can setup the system to do round-robin scheduling based upon time availability of three experts where two may be tied up at any one time. The flexibility is there. Furthermore, the IT support data is structured allowing added analysis indicating where the issues are. IT management can be proactive rather than reactive and identify trends. The CRM system can be used to forecast trouble spots and to allow budgeting and allocating of resources for future time/resource expenditures. Moreover, there a tie-into HR performance management since performance reviews based upon past activities can be completed leveraging activity data recorded using the CRM system.

Generally, you want a CRM system standardized across business functions so there one platform to work



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with, seamless integration with business processes, and a subsequent increase in operational efficiency and low administration costs. This aligns with current and future thinking about IT. IT must support the corporate strategy and provide a business case for continued use of any IT elements. A well designed CRM enables this alignment with strategy. MS CRM 3.0 provides all of these elements and more.

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