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Making your life easier with CRM

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Summary: *One expert discusses the CRM needs of midsize businesses and the benefits an IT department can gain from implementing CRM software solutions.*

Business is all about relationships. Companies dedicate significant resources nurturing the ones they have with their customers, because a good rapport translates into a healthy bottom line. Many companies invest in customer relationship management (CRM) software to help boost their sales and enable marketing teams to manage relationships more efficiently.

Equally important is the relationships between IT staff and their internal "customers" – the people in sales, marketing and the executive suites. CRM software can also help corporate IT staff manage these internal relationships and streamline workflows.

Stephen Ibaraki, I.S.P., a veteran IT analyst and recipient of the 2005 *Computing Canada* Lifetime Achievement Award, discusses the particular needs of midsize businesses, and the benefits they can gain from implementing CRM software in their IT organizations.

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What makes CRM software compelling from a business perspective?

Without CRM software, companies have no central repository of customer data that can be managed in a unified way. Multiple applications are being used with duplicate data stores, which results in multiple silos of information with no effective coordination between them.

This makes it impossible to get a coherent picture of marketing, sales and customer support processes. Also, without CRM software there is no efficient means for controlling these workflows and business processes or generating effective business intelligence reports. In the Internet age, business agility is paramount. Companies need to use technology like CRM software to maximize opportunities as they arise, and with a fast response rate.

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Why should businesses consider using CRM software in the IT department?

In my research as an analyst I'm finding there is a particular demand for internal relationship management in the midrange business sector. These organizations typically have three to 10 IT staff serving 100 to 500 PCs, so they need to be as efficient as possible.

Midsize companies want a simple way to manage the contacts, problem resolution scenarios, and system support issues with their internal employee populations. These employees are, in essence, clients of the IT staff, and this relationship must be managed in a structured way to improve overall organizational efficiency, reduce costs, improve productivity, and support a positive corporate environment.

However, this market is not efficiently addressed with targeted IT help desk software. The products do not integrate efficiently with business systems and desktop productivity applications. Also, their price points are multiples of those offered by vendors such as Microsoft, and their offerings are complex. For some of these products, there are estimates of \$3,000 to \$5,000 per seat with concurrent licensing, which is not cost effective for midsize businesses.

Microsoft Dynamics CRM 3.0 has features that rival many of the well-established enterprise applications, but at a fraction of the cost and with no added complexity due to its tight integration with Microsoft Office and Outlook.

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So how does a CRM solution support IT operations?

A company can tie its CRM system into the business solutions that manage HR, Finance, Inventory, and other departments. So if an IT technician has a laptop and he leaves the company, the CRM system needs to know that he can't be tasked for maintenance jobs, the HR system needs a record of his employment details, and the Assets Management system should be aware that a laptop is free to be allocated elsewhere. You want all these systems to tie together to avoid duplicate updates and mismatched data or, worse still, an actual operational stop or blockage in the workflow.

And as the company grows, or as the load on the IT staff peaks in different periods, you want a structured system in place to handle that growth or those peaks. An integrated, well-designed CRM system will allow all of this and so much more.

It's also beneficial to have a system using a familiar interface. Since deployments of Office are virtually universal in the business world, it makes sense to have a CRM system that works seamlessly with Office and the Outlook.

As an organization grows, IT staff should be making the most of applications used in the organization. The goal here is

Another priority for IT staff should be reducing the number of applications used in the organization. The goal here is having fewer touch points when completing tasks, and less clutter and complexity. A CRM system that allows IT staff to work with powerful tools while simultaneously and transparently working with their customers – the employees – is a perfect combination.

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What benefits can a CRM system offer IT departments?

Research shows that if a CRM system is integrated with the business systems and processes, there is an overall improvement in operational efficiency – anywhere from 15 per cent to 30 per cent. As a business grows, so does call volume. But with a CRM system, the infrastructure is in place to handle increases without pains. Ultimately, there is a lower total cost of ownership, and lower complexity with one platform that integrates company wide.

In IT, support requests to the help desk are put into queues and routed to the appropriate person automatically – the CRM system avoids the need to cut, copy and paste this information in order to have a problem serviced. So employees are serviced faster, they are more productive, and the overall company atmosphere is one of “can-do” collaboration to get the job done. This results in higher morale and improved employee retention.

Common IT tasks such as setting up a new computer account for a new hire happen automatically 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.

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

A healthy, well-maintained IT infrastructure is crucial to a company’s agility. Moreover, improved IT governance is critical to improved corporate governance. IT must support the corporate strategy and provide a business case for continued use of any IT elements. A well-designed CRM system enables an alignment with this strategy.

For More Information

- [It's here: Microsoft CRM 3.0](#)
- [Get easy access and comprehensive insight into customer data](#)

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