

EXECUTIVE QUESTION AND ANSWER

Presented by InnoVeer Solutions and Robeco Direct

BS: How do you define customer relationship management (CRM) and business intelligence (BI) for Robeco?

MB: I believe that CRM is more than just a system or a software application. It is a “belief” or a strategy that you must implement throughout your entire company, starting with executives. CRM needs to be part of an organization’s DNA, and everyone must focus and think about what they are doing from the customer perspective.

In terms of BI, I consider it the facilitator of the CRM process. It is what gives you the crucial data and metrics that not only help in setting business goals and outcomes, but also in driving employees to meet and exceed those goals. Basically, CRM places the customer at the center of your business, and BI helps achieve the customer-focused objectives that you set.

BS: What were the key business drivers that propelled your CRM and BI projects forward?

MB: For us to be successful as an organization, it is important that we meet our customers’ expectations and give them the services and products they need and want. If we are not able to do that, our customer responses, respect, and loyalty are negatively affected.

CRM allows us to place our customers at the center of our organization, so that we can focus on their needs and satisfaction, which ultimately results in greater company success. BI enables us to expand upon these goals by improving our overall sales and marketing process, which then ensures that our customers are serviced more efficiently and effectively.

BS: What challenges did you face during deployment and adoption of your BI initiatives?

MB: We had the ability to present data to our frontline agents to use



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The Robeco logo, featuring the word 'ROBECO' in a bold, black, sans-serif font. The letter 'E' is stylized with a blue horizontal bar through its middle.

during the sales process. However, our main challenge was convincing them to believe that the data in our system was accurate, and recognize how beneficial it could be to them and our company if utilized during customer interactions. It was hard to persuade them to really ‘use’ this information, so in an attempt to ensure buy-in, we decided to formulate a contest to identify effective use of the data.

We evaluated who had the best sales pitch based on the information at their fingertips, as well as by taking advantage of our new processes, and rewarded those with the highest results. By offering these incentives, we were able to show our end users that the data we offered was valuable to not only the company but also to their personal sales goals.

BS: If you were starting over with BI today, what would you do differently?

MB: It is critical for the business to be aligned at the start of a BI project, and for BI initiatives to be embedded into the corporate architecture from the very start. So, as for doing something differently, I would have made sure that everyone was onboard from day one, and avoided too many discussions later on in the process because this really slowed us down.

BS: Do you have any future plans for expanding your current BI capabilities?

MB: A crucial future goal for Robeco would be to ensure more automated, event-driven interaction strategies, in terms of all of the different customer touch points. In other words, we want to make use of the information we already have, understand what types of interactions work best for our customers, and automate them to ensure faster processes. We must also make sure that we are acting in real-time to all of the new customer information we receive. That is definitely in the near future for us. Fortunately, by combining CRM and BI, we have the opportunity to do this.

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BS: What advice would you give other organizations regarding how to ensure successful BI programs?

MB: As members of an organization, it is important that everyone believes in BI and recognizes how it will enhance their existing skill sets. To increase buy-in, it is a good idea to bring members from all teams into the project during the planning phase, include their input, and allow them to voice their concerns and doubts, so that they feel completely part of the process. If employees know that they are playing an important role in a major company initiative or change, it will dramatically improve overall buy-in and program success.

Along with employee buy-in, it is equally important to have strong internal communication and ensure that employees throughout the organization are educated on what data must be entered into the system and how to properly enter it. This is especially crucial for salespeople who commonly work very independently, so that the communication between marketing, key executives, and all sales team members is streamlined and clear. If business opportunities and sales information remain on paper or sitting on desks, as opposed to being entered into the system, there is no way to track, analyze, or use this information to improve processes, understand metrics and reports, and make better and faster business decisions.

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