

CRM Data Profiler from CCS

A meaningful engagement with your customer is possible only if we have the right information at the right time. Let us take a few examples - **Serving a Retail Banking customer** meaningfully requires understanding of his relationships and preferences. Closing a corporate opportunity requires understanding of the organization's needs, priorities, and pain-points, establishing connect with key stakeholders, understanding decision making process etc.

Engaging effectively with a customer and the success of your CRM initiative, therefore, is dependent on the data you gather at every stage of the customer engagement. There is no debate on the importance of the right data at the right stage for successful customer management. We all agree that **the right info at the right time** powers any successful customer engagement.

But how do we go about collecting data? It is easy to add fields in the CRM database with an aim to collect granular information on customer, account, opportunity, competition etc. But is having an elaborate database the right solution? Not necessarily. In fact, an elaborate and complex data gathering process is an impediment to clear customer insight. While creating a data structure for information gathering is easy, there is no tool that tells a user what information to collect at what point of time! There is no way to understand which information is more important. There is no way to assess where do we stand with respect to the data collection process. Without a well thought out approach to information collection process, the act of data gathering (and eventually CRM success) is nothing but a series of rolls of a dice.

C Centric's solution for data profiling tries to address these problems and put a 'method in the madness' of what is currently called customer data enrichment process.

Define the importance of the data you seek

'All animals are born equal,
but some are more equal
than others'

Animal Farm, George Orwell

Likewise, not all data are equally important in all stages of the customer engagement, some are invariably 'more equal' than the rest.

In a retail banking branch counter, with a ten-second's engagement window available, which information should you seek from a customer? And, once that info is collected, what to seek next? For a corporate

opportunity, what information are crucial at the beginning of the engagement? (and how does it change as the opportunity progresses?). Traditional systems allow you to create data fields, but does not tell you their order of importance.

With C Centric's profiler, you will be able to identify the key data elements for any entity (whether standard or custom) and assign a score (or percentage points) to them to specify their importance. An ability to identify data that are crucial at various stages of customer engagement, result in better quality data. Moreover, with an organization-wide definition of importance of certain data, the data collection process is also streamlined. Collection of relevant data is no longer left to the interpretation of the user.

Data collection patterns varies based on type of record. Create flexible Profilers

The data requirement and collection process is not uniform for an entity, it varies based on the nature and type of each record. The data requirement a retail opportunity is entirely different from that of a corporate opportunity. Similarly, the data profile of a 'Gold' customer may vary significantly from a 'Standard' customer. C Centric's profiler allows you to create different data profiles for the same entity depending on a set of conditions. Define a series of profiler templates that will change the data requirement as the engagement progresses (e.g. opportunity changes from 'cold', to 'warm' to 'hot', customer changes from 'blue' to 'gold' to 'platinum' etc.). C Centric's Profiler will help you identify the most important data to capture at all stages of customer engagement.

Define the sequence of data collection

Alice: 'would you tell me, please, which way I ought to go from here?'

The Cheshire Cat: 'That depends a good deal on where you want to go.'

Alice in Wonderland, Lewis Carrol

Once the importance of data is identified, we can immediately start collecting the most important data first. (Sounds logical, right? Wrong!)

A data field having a higher score does not mean that we can jump right in to collect the data! We would love to know 'the total investable surplus' of our customer, but not before we have collected some basic information (and established initial connect with him). We will love to know when the deal will close, but not before we have gone through the initial qualification and need analysis.

C Centric's Profiler allows you to set a *sequence* to the data to be captured. Once set, it creates a Data Map and guides the user through the labyrinth of data collection, one sure step at a time. With C Centric's profiler, everybody in your organization knows 'which way to go from here'.

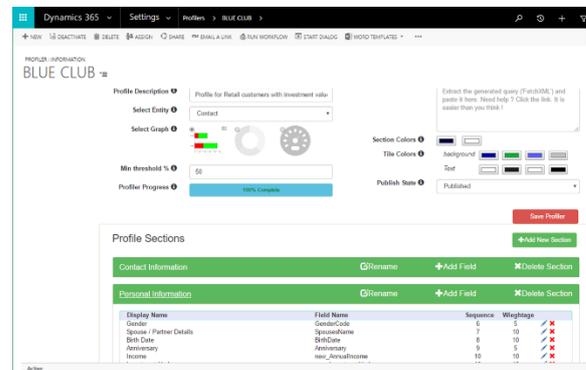
View the score and compare with Benchmark

It is necessary to know where we stand with respect to profile completion. CCS profiler gives profile score for every record and compares with the minimum threshold set for the profile. This lets us know how well we are doing and how much more to go.

Profiler in action

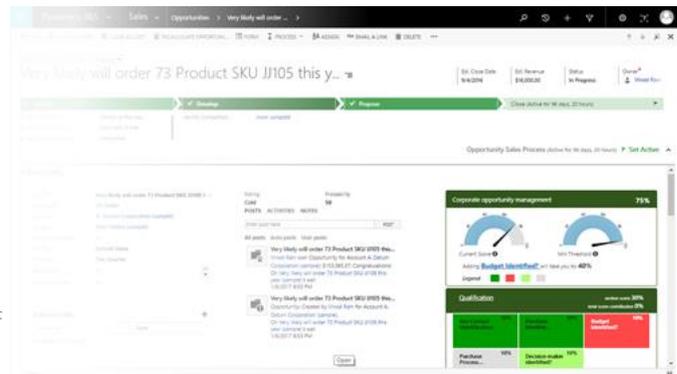
Use the Profiler Master to create your own Profile definitions for any entity:

- ✓ Use the intuitive user-interface custom-built to make the process easier.
- ✓ Select the object of your choice. Enter the conditions that uniquely define the profile.
- ✓ Select the fields that form a part of the profile and choose their scores.
- ✓ Enter their sequence and create a roadmap for data collection
- ✓ Group information under sections for ease of access and reference
- ✓ Use visualization tools like graphs, charts and colour palettes to define your profiler

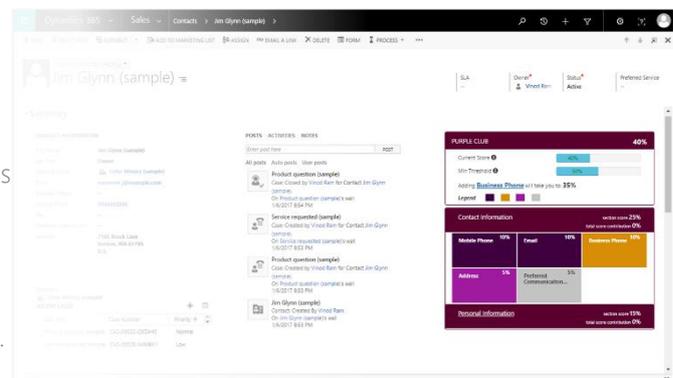


Once the profiler is set, the same can be included in the page layouts. Choose the best page layout to depict the profiler. Once published, the embedded Profiler section guides every user through the data collection and review process.

Profile your opportunities - The Head of Sales gets a birds-eye-view of the info gathered for the opportunity. Critical missing info are immediately apparent. Sales management can immediately and intuitively assess the risks in the engagement. An opportunity review and identification of bottlenecks is now much easier

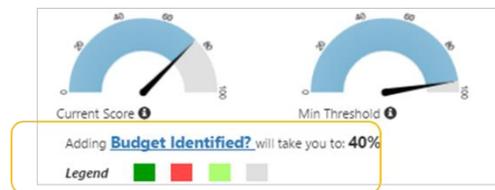
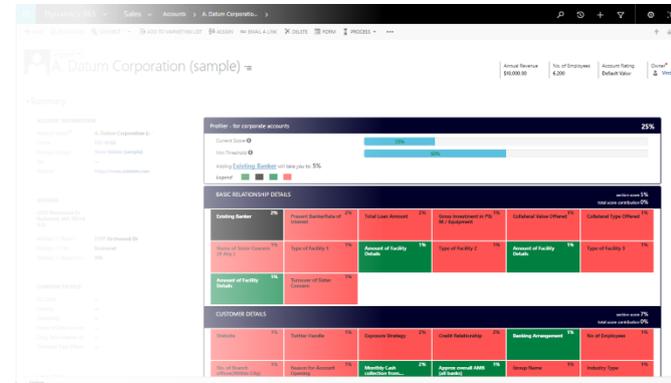


Profile your Contacts - define multiple profiles for different type of customers. Seek more info as the relationship deepens. The profile questions change as the contact evolves from 'Blue', to 'Gold' to 'Purple' Club. Note that the colour scheme changes too! Now important customers can be identified immediately.



Create your **Corporate profiler** – a detailed profile map gives a visual representation of our knowledge of the customer., right from basic contact details to info about the organization/ sector/ employees, Products bought from us/ from competition. ‘White Space’ or potential cross-sell / up-sell areas are visually displayed. A quick glance the profile map, tells us how much we know and what to focus on. Cuts down account review time significantly.

The Profiler guides you through the data collection process. tells you what information to collect next. Tells you your score wrt. the threshold set. The data gathering process is no longer left to individual whims. Now there is an organization-wide process of enriching your customer insight.



Well, in our country," said Alice, still panting a little, "you'd generally get to somewhere else — if you ran very fast for a long time'.

"A slow sort of country!" said the Queen. "Now, here, you see, it takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast as that!"

Alice in Wonderland, Lewis Carrol

In today's business, competition for customer's attention has intensified, customer loyalty is at an all-time low, differentiations of product and services are eroding, with more choices available, the customers are becoming more demanding.

Red Queen's prophecy has come true. Now it takes all the running we can manage to keep in the same place! If we want to 'get somewhere else' we need to react to market opportunities 'twice as fast'. Only our nimbleness in understanding the customers and their needs, ability to identify gaps and quickly addressing them will keep us relevant.

Customer Management tools from C Centric Solutions, built on Microsoft CRM platform, are designed to build better insight about your customer. Write to us at sales@ccentric.co or visit us at www.ccentric.co to know more about how we can help.