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BUILDING YOUR PUZZLE

In the introduction to this book I used the analogy of building a house without a plan to trying to implement your CRM strategy without a plan. I'd like to use another analogy that drives the point home in a more practical sense.

When I give seminars on this subject, I often play a little game. I hand everyone in the audience a puzzle piece and, without showing them what the puzzle is supposed to look like, I ask them to identify what the finished puzzle is supposed to be, just by looking at their one piece. Obviously, no one can ever do this, no matter what piece he or she is holding. I do, however, get some very creative guesses.

The point I'm trying to make is that without seeing the entire picture, how can anyone see how their piece fits into the bigger picture or what the big picture actually looks like. I then ask them to ponder this - if I told them they could work together, but still not see the picture of the puzzle, do they think they could build the puzzle anyway? If so, how long would it take? In reality, they could probably build the puzzle over time. But is the time spent worth it? It would, in fact, take an inordinate amount of time for them to build the puzzle without seeing what they were building. They have to resort to guess work and shapes. They'd have to guess at what the similarly colored pieces might be forming as well as try to fit the matching shapes together. Without knowing what they are building, they are working in the dark. This

is the same quandary as building a house without a plan, or blueprint.

Let's think for a moment how we typically build puzzles. Let's say we have a picture puzzle of a tropical island. The bottom of the picture is the aqua-green ocean. Just above that is the sandy beach. Above that are palm trees with their dark brown trunks and umbrella-shaped branches hanging above. At the top of our picture is the ice-blue sky with some puffy white clouds.

So the first thing we do, after studying the picture, is dump all the pieces out on the table and start sorting them by colors as they match the picture. The aqua-green pieces get grouped together, then the sand colored ones, then the brown tree-trunk looking pieces, and so on. Now we are ready to begin. We may pick the pile with the fewest pieces so we get a more immediate feeling of accomplishment. Or, we start with the largest pile to get the biggest challenge completed first. Whatever the case, we have an organized method for building our puzzle and it is based on the fact that we know exactly what we are building. We also don't start building the whole thing at once. We start with one section at a time.

How does this fit into designing and implementing a CRM process? I assume by now you have figured out the analogy I am trying to make. You must have a plan or layout or picture of what you are trying to achieve before you begin the process. Otherwise, everyone will be building their own puzzle and most of them won't fit together. Also, when you're building something (house, puzzle, CRM process), it should be done in steps, or phases.

Have you ever been involved with a company where this has happened? Each department developed or implemented a solution to their own problem but did not consider the needs or requirements of other departments? Everyone had their own unique thing, yet no one was communicating or working together. This causes enormous conflicts and is tremendously counter-productive within a business.

Now consider this from the customers' viewpoint. I own a major credit card, as I'm sure most of you do too, which will remain nameless so I don't get myself in any trouble. This one is not a bankcard and therefore requires full payment each month. It is their Gold card, which means I pay each year for the "privilege" of owning it. I've had this card for over 20 years. Yet, at least once a year I get a direct mail piece from the "President" of this credit card company asking me if I would like to sign up for their card. And, to sweeten the deal, they will let my wife have one too for a fraction of the normal cost.

Do you think perhaps the right hand doesn't know what the left hand is doing? Sometimes I believe that the right hand doesn't even know there is a left hand. If I wasn't such a nice guy, I'd actually get offended by this and consider dropping their card. But I just laugh and write it off as yet another example of a company who doesn't have a comprehensive plan to work from. Their marketing department, who is trying to acquire new members, and their sales department, who has already sold me, do not communicate. It's also quite reasonable to assume that they aren't using the same customer database. Typically, Marketing has their own "prospect" database and unique application software that generates the list of prospects selected to receive these offers from the "President".

Similarly, the Sales department has their own database and unique application software to track who they are selling to or have already sold to. Never the twain shall meet.

So, how does a company go about developing a plan and what should a plan look like? We'll talk about how you would actually go about developing the plan a little later on in this book. This chapter will focus on what a puzzle can look like and how each section, or company department, can interrelate with others. The result of creating a puzzle is a workflow in which you can align your company's resources to provide the best customer relationship experience possible.

So let's jump into building a puzzle using a hypothetical company. Diagram 3-1 on the next page illustrates this example. Your company may or may not resemble this example, but I am confident you can draw some correlations to your business. Let's start with Marketing.