CRM Evolution

Extending CRM beyond an efficiency tool into a platform for a culture of relationship

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We hear a lot about disruptive companies these days; but we rarely hear about the shifts in relationship structures that make the disruption possible.
CLIENT QUESTION #1

What do my customers really care about?
Shared Purpose
Immediate, real-time support from trusted sources
CLIENT QUESTION #2

How do I know what to do with my customers?
Shared Purpose

Clear Roles
CONNECTOR
knows who’s who; room reader; matches have and wants

INNOVATOR
sees potential; tinkers, tests and quantifies; generates ideas

BUILDER
thinks in scenarios; sees opportunities and risks, makes thorough plans

SHARER
high-volume communicator; fast info processor, energized by new inputs

CURATOR
knows quality; narrows easily; creates collections

STORYTELLER
observant; moves people; able to visualize a journey
Define and align key actions for each role

- **EARLY ACCESS:** CONNECTOR
- **FIND BUGS:** BUILDER
- **HELP A FRIEND USE:** STORYTELLER
- **CURATOR**
- **INNOVATOR**
- **SHarer**
CLIENT QUESTION #3

How can I sustain engagement with my customers?
Shared Purpose

Clear Roles

Right Rewards
MATERIAL
What is the financial or material benefit to joining or participating?

EXPERIENTIAL
What’s offered that a participant can’t do on his or her own?

RECOGNITION
How will a participant be viewed for joining and taking action?
RIGHT REWARDS

Material

Experiential

Recognition
LOOKING AHEAD

Making the **business case for relationships** to my manager
Increased customer engagement

Strengthened relationships with customers

Expanded impact of shared goals and business results
BUSINESS CASE

High-performing engagement: 8% ROI increase

Low-performing engagement: 23% ROI decrease

Read more at
BUSINESS CASE

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Thank you

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For all the emphasis placed on customer relationships these days, very few large organizations really understand how to manage them. Whether you're a corporation, a...