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Using Flexibility in Designing CRM Solution

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Abstract

The role of flexibility is eminent in design of a CRM solution. But the challenge is how to embed it. We must know where exactly to apply it. We started with investigating critical features of a CRM solution and ranked them in the order of importance. Our research also identified that two sets of flexibility will affect the CRM design- the flexibility of CRM process and the modules therein and, the flexibility of CRM design and its users. Basis this and our ranking, we mapped the flexibility of each CRM feature on a scale between flexibility and rigidity. Features high on flexibility were prescribed to stretch and those were low advised to control or divest, using the two sets of flexibility. For example, where flexibility of the CRM design and the users- both are high, stretch to the extent possible to include applications that will be required now or in future. Where flexibility is low for both, control by divesting the un-required. To help this process of building flexibility, we defined CRM-flexibility continuum that discuss four set of activities. Finding out what sort of flexibility will be important in moving towards business value, listing roadblocks in its way that can reduce it or push it toward rigidity, and then planning to eliminate these to move towards achieving total flexibility.Thus, an organization may choose its CRM solution based on evaluation of flexibility- the ability to customize (its process-flow) and ability to stretch (its modules), the ability to self-control (its design) and ability of its user to control (design)- to meet current and future business requirements, without causing disruption in business continuity and the profitability.

Keywords: CRM, Flexibility, Design, Users, Process, Module, CRM Scoping

1. Introduction

CRM is *deus ex machina* for its ability to track and monitor, and provide the solution to almost every customer issue that a modern organization faces today. From prospecting to customer onboarding, from after-sales to cross-sell- it can do *n* things managing customers for profits. All you need is define the output you want. However, we know, certain logics must be pre-configured into the CRM for it to process the customized output. Therefore, it is imperative that the CRM solution architecture should be designed with flexibility to embed customizations. A business seems favorable today may change tomorrow. In that case, CRM might also require change in its configuration as well. But what if your system does not have this scope to accommodate changes. You have not provisioned for this situation when designing the CRM and now you are caught up in a situation where on one hand are the investments (time*cost) you made in choosing and implementing the CRM solution, and on the other hand, your people who do not find it useful anymore. That's how the best of the CRM systems collapse. Either they are not

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provisioned for future needs that may arise during business (like a regulation change or an internal policy change) or they are very rigidly focused on meeting the present business expectations. This shows how important flexibility is in designing the CRM.

Flexibility is the elasticity to stretch beyond a set traditional boundary. For example, CRM users outgrow in numbers from *x* to *y* over a period of *t* years. If the existing CRM system does not have provision for adding *y* users, it would fail. Consider another example, you have added a new product line to your business, but your CRM can accommodate up to only *x* products. What would you do? One more example, you want to start a self-service customer portal but that can allow only *x* customers to use the facility at one point of time while you have *2x* customers waiting to get into the facility. Can you afford to lose the customers who could not be logged-into the service portal due to your existing CRM limitation? Lack of flexibility can fail the CRM system miserably. So, we should ask- how can we use flexibility to knock-off our chances of failing and, at the same time optimize our growth by transitioning smoothly into the future.

To deploy flexibility,we must decipher first the traits of a flexible CRM. We began with asking- How can I know if a CRM is flexible or not? Does it offer the flexibility our business needs? Two views are offered in this direction. First is, looking at different decision points that have different requirements classified into strategic, tactical and operational CRM. Second is, customization requirements as organization grows in the size (Steel et al., 2014). We have tried to consolidate them in two sets for better understanding.

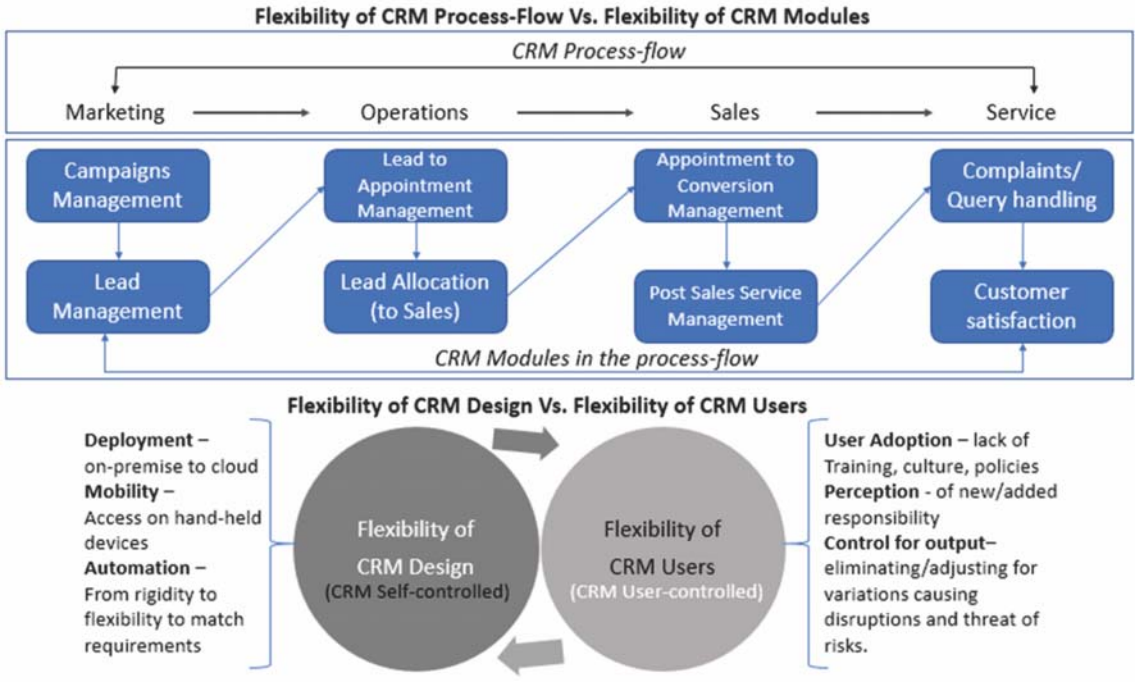

Figure 1: Designing Flexible CRM

According to our research, there are two sets to look at it. The first set is **'flexibility of the CRM process' versus 'flexibility of the modules design'** (or flexibility of the design of the modules). The second set- which is relatively more noteworthy is- **'flexibility of the CRM design versus flexibility of the CRM users'**. The model representation is presented in figure 1 and is subsequently discussed in the sections below. This matches the concept of flexibility as defined by Volberda (1996) that- flexibility is an interactive process between elements of 'organizationalsystem' and 'business environment' (Bamel et al., 2013), and whose determinants are 'managerial capabilities' and'controllability of design' for responding and adapting to change. Flexibility, in fact,as a conceptis theoutcome of interaction between these two properties of control in balance.

2. The First Set: Flexibility of CRM Process Vs. Flexibility of Modules

Most CRM vendors sell their proprietary software platform that typically has an inbuilt process (CRM flow) designed structurally (Ahn et al., 2003), and the modules therein that are customizable (like campaigns and lead management for Marketing, customer service for Operations, account management for Sales). These modules are customized to tackle specific business requirements for example e-commerce CRM and Social CRM as they get more specialized (Chen and Vargo, 2013). This will need varying degrees of flexibility for each module to customize, depending upon the infrastructure stack, system configurations, number of integrations required, hierarchy layers, number of users and data-size capabilities (of server) to name a few. Compared to these are some CRM that are fully flexible to offer high-end customization of modules. They offer to build your own CRM process-flow using your own set of logic to suit your business needs. Like for example, a business is only into customer service & support and do not have any marketing or sales units. Here, it is futile for this business firm to (dummy) configure marketing and sales process-flow (and their embedded modules) and pay for not using it. Where CRM is flexible, the firm can jump the process-flow, customize it to add or delete unwanted activities/things getting in the way and, move fast towards the business value-chain (Voola and Muthaly, 2005)by understanding economic value for guiding on decisions (Kumar and Reinartz, 2005). Similarly, flexible CRM can help customize the modules say, customize objects from scratch or combine existing, create new application altogether, interoperate from one module to another seamlessly. Such CRM systems are mostly the open-source technologies that are low on costs but high on efforts and complex to implement if developing from scratch. Thus, an organization may choose its CRM solution based on evaluation of flexibility i.e. ability to customize its process-flow and ability to stretch its modules. According to Sushil (2013), the evaluation of available choices in the organizational system andmanagerial capability to pick up or re-generate a more appropriate choice. So, the ability to customize will need evaluation of choices available with organization and will depend upon capability of its people.

CRM users (of each module like Marketing, Sales) give their requirements defining clearly their expectations from CRM and the functionality (process, data-sets, objects and the output usually referred to as dashboard) they want. A project manager gathers these requirements and compiles it. This document is called BRD (Business Requirement Document). Next step is to translate these requirements into FSD (Functional Specification Document). This typically starts with defining input (in the data form) to track and improve a pre-defined output (business metric) that the users desire to achieve. Each module has an input-output relation defined in the Scope of Work (SOW) from where we can get the sense about things it can or can't do. Some metrics in this direction are customer acquisition cost, customer conversion, revenue change per customer, lifetime value, repeat customer, customer churn rate, customer interaction points and frequency (Winer, 2001).Accordingly, the flexibility of CRM design can be known that will help us answer if this CRM will be able to offer the flexibility our business needs.

3. The Second Set: Flexibility of CRM Design vs. Flexibility of CRM Users

CRM solution can be deployed in two ways: on-premise by installing it on the Company server or the cloud-based as aSoftware as a Service (SaaS) model which is comparatively quick and easy to implement and maintain but may have security-based concerns (Hsu and Lin, 2016). In its vanilla product form, CRM offers basic functionalities which may cater to the requirements of an SME but even these Companies will need some sort of customization that may vary from basic to complex customizations. It is often seen that in future the Company's requirement for customization invariably goes high as it matures through the stages of CRM post-implementation (Nguyen, 2007). As the organization ramps up its business adding new product lines or introduces new processes it is going toneed the flexibility to accommodate these changes.

In our opinion two types of flexibility will be needed here-one is 'flexibility of the CRM solution design' (or design) and the other is'flexibility of the CRM user'. CRM that can switch between 'on-premise' to 'cloud-based'model is an example of flexibility of CRM solution. A firm may want to cut down on its IT infrastructure costs and decides to go for subscription-based cloud server from the existing on-premise model that was deployed earlier. Flexible CRM will not justbe able to do this switch but also be able to accommodate the migration of existing records saved on its on-premise CRM to the cloud.This will help the firm sustain business continuityby simply allowing CRM to switch without causing data-loss of existing records whichcould affect the users especially the front-office executives. These executives enter data into CRM(the input) that ranges from business transactions toservice requests received from the customerstoggling between pre-and-post sales stages. Such data becomes the premise for middle and senior-level management for monitoring the profitability and decision-making for the future. This can really be critical.

Imagine your customerslog-into their net banking account and learn that their statements of account (historic transaction data) are not being displayed. Why? Becausethese banking transaction records cannot be migrated from bank's existing CRM to thenewly deployed CRM since it is not flexible. Neither it cannot accommodate such large number of records nor it hasthe required number of fields (or data sets) to display the relevant customer informationimportant to staff for service. As customer also if you require snapping between two CRM systems with two sign-ins to access your transaction records; there is a high possibility that you will end your relationship with this bank soon. Hence organizations need flexible CRM that can be deployed anywhere andshould be adaptive to customize as per the business dynamics.Contrary to it, most CRM solutions can align well to the organization's unique business processes but may fail miserably to accommodate changes or expand these processes.

Another example of flexibility of CRM design is about mobility. Flexible CRM usesnative app-based interfaceor simply the webpages made on HTML 5 that can be easily accessed through hand-held devices. It offers great advantages. It improves sales productivity (Kim et al., 2015) by providing prospect and customer leads (appointments) on their mobile devices with all the basic information required to approach them and convert them into business. For example, managing tasks on the go, get updates in real-time, organize sales appointments and other priorities. This has drastically cut down on office costs for organizations since sales staff can work remotely using CRM as single application. For sales, it means spending more time on planning and meeting leads and, maximizing their chances to accomplish sales targets. Some solutions even work offline as well which is especially important for locations where internet connection is weak or negligibly available. A salesperson might visit a customer location that has no or little internet connectivity. In such cases, flexible CRM lets the sales staff to still enter (update) the data and complete the transaction. As and when connection is restored (or when salesman come out of this customer's/meeting location) the offline transaction gets synced with CRM.

Our research identified and evaluated such six strategic features that can be attributed to the flexibility of CRM design, to help us understand the use of flexibility in its design further. We call it 'CRM scoping'. This is presented in the section below but before moving onto it, we would want to know the concept of flexibility of the CRM users.

In situations where a CRM design might require user intervention repeatedly for its working, we attribute it to the 'flexibility of the CRM users'. The biggest challenge in implementing CRM is user adoption (Jaber and Simkin, 2017). Failure in user adoption mainly arises due to reasons like lack of customer centricity in CRM design that does not add any value to either customers or users and rather makes the process complex and long. Some other reasons are lack of staff-training, user's perception of CRM as an additional task than a tool to become efficient at work, and the fear of change- mostly the behavioural issues (Frow et al., 2011; Pedron et al., 2017) which are also classified as and classical and contemporary issues (Awasthi et al., 2014). However, most compelling reason is not being flexible enough to accommodate the changes user want as they evolve in organizational processes and structures to encash new opportunity or improve an ailing business situation. User's flexibility of CRM can help dealing with these challenges. By being flexible, users can control (for variations and) the output better. Where flexibility of CRM design has been leveraged fully; competitive advantage will come from the flexibility of the CRM users.

A business firm may decide to make its CRM scalable using the flexibility of the CRM design. However, this scalability is possible up to a certain extent using different combinations of flexibility (from highly-rigid to fully-flexible). When scaling-up further is exhaustive and constrained by the flexibility of design; the next level of scaling-up will come from the flexibility of users- how CRM users plan to exercise their flexibility. For example, user may cut down on efforts to accommodate all customer data and take only relevant data into the CRM system and control data usage and data space on server. Another user may add only limited data sets/fields for newly introduced product line that he thinks will be enough for MIS generation and controls data from cluttering. A user may limit or restrict the data access for other teams from viewing this new product-line/ customer data thus controlling the information- sharing. Thus, different users may scale-up the CRM system by controlling for relevant or desired output at their levels/hierarchy. Thus, user's flexibility can help adapt CRM to business changes, track progress against set metrics like optimizing the sales cycle from appointment to transaction, make changes in current business process, streamline them, capture the critical data for productive decision-making and to predict customer behavior, and finally improving the reporting.

We can, therefore, remark that the flexibility of the CRM design is provisioned chiefly to self-adjust/self-regulate and auto-correct once defined logically, deploying some technologies, to control output. Contrary to it, the flexibility of the CRM users controls the output directly to alter the (flow/mode of) output as per the user's need and not necessarily the need of the business.

4. Scoping for CRM Flexibility

Our preliminary investigation conducted with 90 CRM practitioners we connected through a professional networking site LinkedIn helped us compile the list of important features in the CRM design from most important to least. We gathered a list of 17 features from a total of 59 respondents (i.e. 65% response rate) that we consolidated into 6 removing vague, unrelated and unclear entries. We then used frequency method to define their propensity in the order of most important to least. Next, we asked these respondents and few more practitioners we added to our network to rate each feature on a scale of 1 (least important) to 5 (most important). Basis this, we calculated the score for each feature- out of a maximum score of 30- for 147 responses received out of 201 contacted (73% response rate). Scores thus obtained were converted into

percentage-based ranking (to compare with the previous ranking). A post-survey ranking of features was compiled to look out for any deviation in respondents' opinion w.r.t to the original or the first ranking.

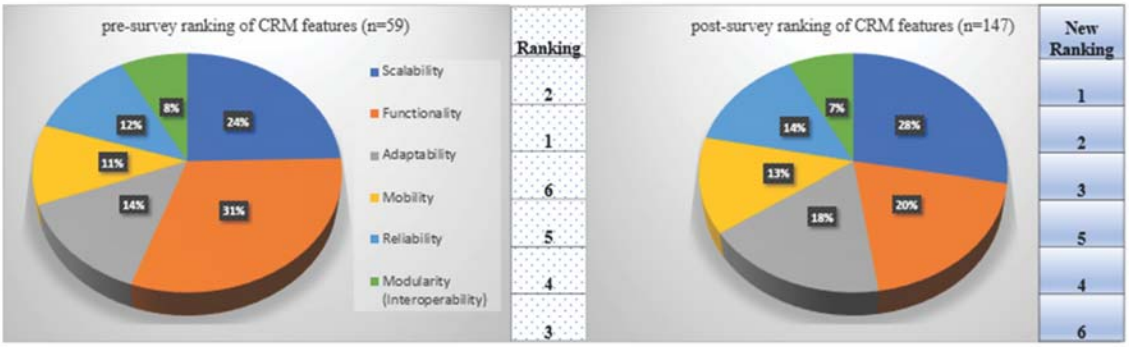

Figure 2: Ranking Order of CRM Features

Though we did not find large deviation in responses, the ranking of some features was now altered. For instance, in new ranking 'functionality' was swapped with 'scalability' so it slipped from most-important feature to second-most important in the ranking. Most severely affected was 'modularity' that dropped to least-important only to be replaced by 'adaptability' at the third rank. 'Reliability' and 'mobility' were the only consistent features- ranked fourth and fifth respectively. This is presented in figure 2.

Our objective by conducting this dipstick was to know the top-rated CRM features by the practitioners to include them for our research further. Unearthing these features will help in the process called 'CRM scoping'. In fact, these features will serve as 'parameters' for defining the scope for an ideal CRM solutiondesign and save the implementation from bloating.

CRM scoping is done when preparing the BRD (Business Requirement Document). It covers all the functional aspects that CRM is expected to do (how it will solve department challenges for e.g. marketing needs to know how many leads were converted into customers and similarly sales will be interested in calculating how much revenue per product per customer on an average can contribute to their targets). But many times, CRM system is designed basis the present situation facing the organization and it does not anticipate requirements that might appear in future. Not even the immediate ones. That is where the rigidity seeps in. We call it CRM myopia where CRM is designed to solve immediate problems but often not the root-cause. For example, requirement of a Lead Management System (LMS) for increasing the new customer inflow as a strategy to counter the churning and hence failing to overlook the real cause of 'customer churn' which may be due to poor servicing or staff training issues like inability to troubleshoot. We prescribe CRM scoping hence must include flexibility to identify what things would be needed in the future. Each parameter used for scoping is to be mapped on flexibility continuum. Accordingly, the CRM design will be checked for consistency.

The process of scoping starts with asking-what are we trying to solve? For example, a business firmmay want to scale further to accommodate more customers or new product lines to its existing CRM. Add a new functionality or delete an existing. Align its processes to adapt quickly to a future business change. Need mobility for its diverse teams and remote offices or simply want a single reliable tool to track everything (leads, appointments, conversions, dropped leads, business transaction, revenue and targets etc.) at one place. Evaluating the strength of these

features (or the parameters) will help this firm know how critical some features are compared to the others, to solve its respective business challenges. So, let's say if this firm is facing the challenge to accommodate newly launched product-line (which includes its customers, sales data), it will need the flexibility to scale-up and adjust to its existing value chain without causing any disruption in the current operations funnel.But how much flexibility will be neededmust be known before-hand. For example, in this case, scaling-up can happen in two ways- one is to provide flexibilityin CRM for anticipated changes for an estimated future period to accommodate expansion (or downsizing) plans. Second, is to have flexibility of open APIs (Application Programming Interface) for integration with different applications that are being used or will be used by the firm now or in future. Both ways will be required as the part of scaling-up in CRM.

Similarly, flexibility of other features like functionality, mobility, modularity, adaptability, and reliability will be important in evaluation of scaling-up. Each feature will have some sort of inter-dependence on other features. Thus, in our example above, scaling-up will need not only the 'flexibility of its own' but also analyzing the 'flexibility of other' features. Clearly, the firm should evaluate the role of other features as well in scaling-up. It should ask- can we scale-up by providing mobility to sales team or by adding-up more functionality in CRMfor improving MIS efficiency for decision-making rather only introducing new data sets or fields in our CRM for scaling up for this upcoming new product line. Thus, mapping flexibility will ultimately shape the CRM design for this firm. See figure 3 for visual representation.

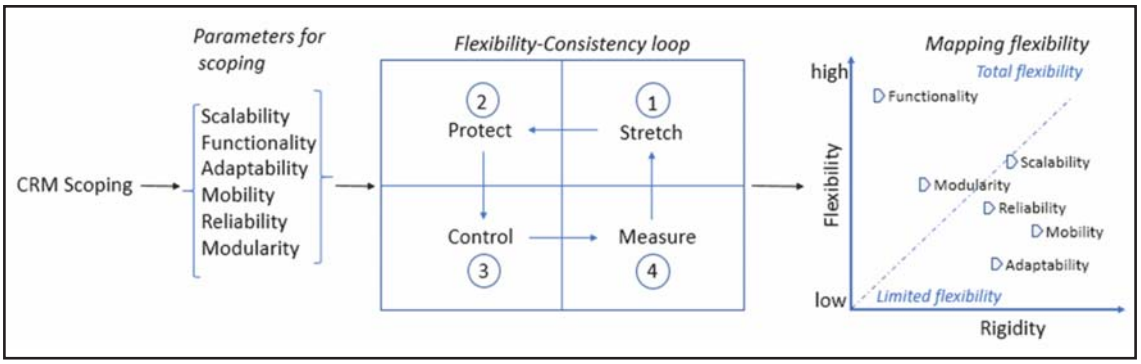

Figure 3: Model for CRM Scoping & Mapping Flexibility

This is how flexibility can play critical role in defining the scope of CRM and engineering its design. It evaluates the strength of the CRM features based on their ability to stretch (i.e. flexibility), sustenance of this ability to stretch, ability to control variations caused by other/ overlapping CRM features. We call this process- flexibility-consistency loop- to gauge how much flexibility will be required for consistency in (features contributing to) CRM design where consistency is the ability to stretch and control output without causing adverse or undesirable disruption in existing process.

After mapping the flexibility of each CRM feature, we can now plot them on flexibility-consistency loop. The flexibility-consistency loop is in the centre as shown in figure 4. It suggests how much each feature can be stretched (added/modified), protected (for minimum stretch it can do or have done in the past), controlled(through self-control or user-defined control)andmeasured(if the output is in line with what was perceived when the system was being stretched for). For example, in our research we find that 'functionality'will require higher flexibility in comparison to other CRM features for flexible CRM design. It means there can be more functions (features)

that the organization may require/intend to add in future hence it should keep this part most flexible (and open for API integration) than other features like 'adaptability' and 'mobility' which require less or limited flexibility. Similarly, the next competitive advantage in designing flexible CRM will come from 'scalability'. As these features move from highly flexible to rigidity, the consistency of feature starts to come down. We advise as they start to cross the baseline between flexibility to rigidity, like 'modularity' and 'reliability' here, they must be protected for sustaining their performance. For those who have reached or about to reach the bottom shifting continuously towards the rigidity, they should be controlledfrom deteriorating further and improved for flexibility. If due to any reason those features can't be improved, they should be dropped off or removed from the priority for the CRM design. This protection and control will come from the flexibility of the CRM design and the flexibility of the CRM users.When CRM is programmed to self-design we call it flexibility of CRM design. When CRM is required to be controlled at different steps by its users we call it flexibility of CRM users. *Figure 4* illustrates these two strategic scenarios. When both- the flexibility of CRM users and the flexibility of CRM design- is high, it is advisable to scale the design to meet as many diverse needs as possible. Similarly, when both are low, control the design by divesting the un-required features for the time being.

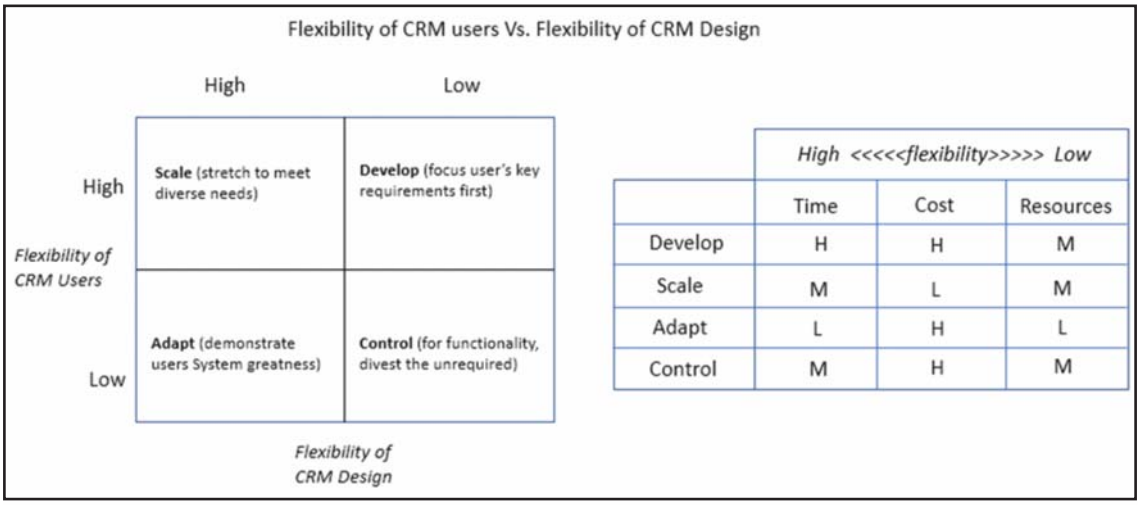

Figure 4: Flexibility-based CRM Design Matrix

This matrix also helps us in understanding what should you do when flexibility of CRM users is higher than flexibility of CRM design: focus on user's key requirements first. In the opposite scenario, design CRM to suit the adoption. Basis this matrix, further you can find out how much time, cost and resource (scope) flexibility will be required in the assessment of every CRM feature. For example, higher *time* and *cost* flexibility will be needed in developing the CRM basis the inputs given by its users and the experience of its designers.

5. Building Flexibility

Now that we know from our discussion above the importance of flexibility in CRM design, its traits and types and the practice of mapping it and,how CRM managers can strategically use this knowledge in designing CRM vis-à-vis to the organization's scope of work. What we yet haven't spoken about is how to build this flexibility. Is there a way to endorse it? After, we have known the critical CRM features (like CRM functionalities) and the amount of flexibility each feature need (very-high flexibility as in our research) in arranging them in design;next we would want to know how can we build this flexibility.

We evaluated and prescribed two sets of flexibility as ways do it- the flexibility of CRM the process and the modules and the flexibility of the CRM design and the users. It requires matching users' expectations to designer's abilityusing flexibility. It's like matching efficiency to flexibility (Adler et al., 1999). In nutshell, how much flexibility CRM users and, designers demand to suit business requirements? Is there a consensus on it? Figure 4 will helpus decode it through what is called flexibility contnuum. It is a scale to segregate the activities that will help build flexibility ranging from most important to least. On one end is 'go-forth' which lists down the must-do activities that are highly important in increasing flexibility to help the business move towards value fast. On the other hand, is 'let-go' that lists down that activities that are mostly the un-important, not a priority, not possible right now or time-consuming. However, word of caution- applying the choice located on either of theextreme-sides can be disastrous for business (Sushil, 1997).

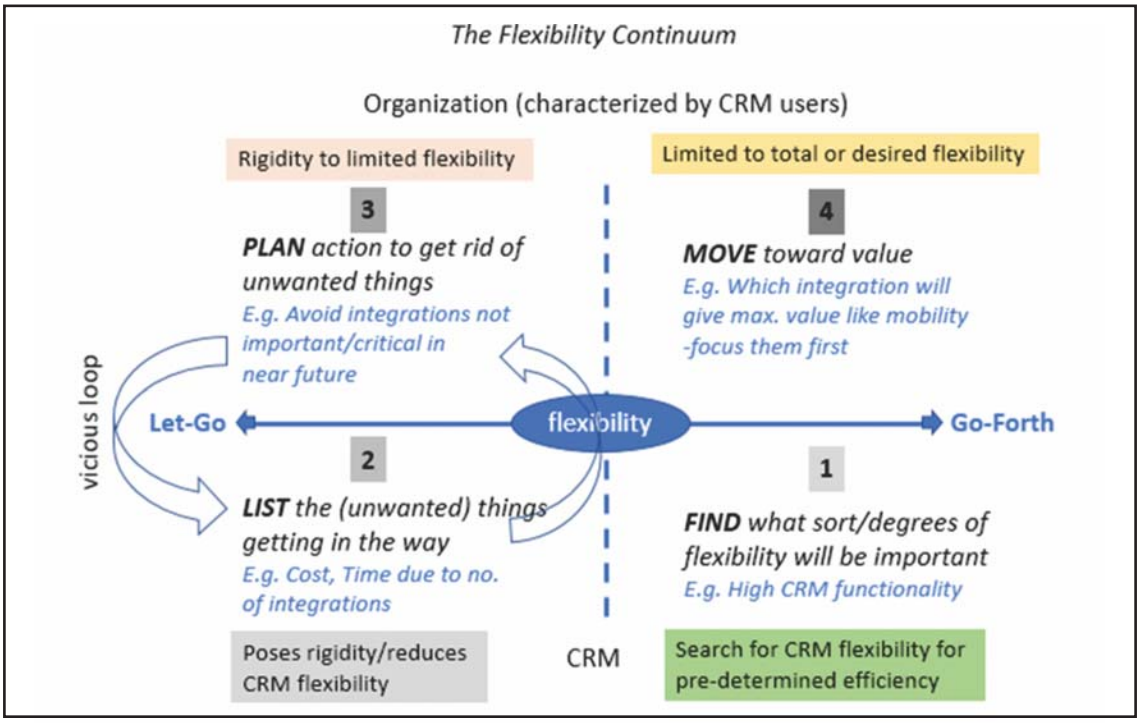

Figure 4: The Flexibility-CRM Continuum

Once it is known that which feature (like functionality in figure 3) needs the highest order of flexibility we can then look forward to sorting out what things are getting in its way. Like cost, time, number of integrations required, inbuilt CRM capability etc. We try to uncover the factors that refrain us from allowing flexibility for greater control like- integrations that depend upon the third party and are time-consuming and not very critical in near future. It is from here we move towards higher flexibility that is required by us by divesting un-important activities associated with this feature and focus on critical ones to leverage its potential for robust CRM design. It is mostly seen that CRM designers often get caught up in vicious loop of *stages 2* and *3*. The unwanted things keep on coming into their foresight and they get busy in planning for getting rid of them. Beware not to end up being into this swirl. Important is plan action to get rid of unwanted things and move towards value by focusing on them first. For example, which integration will add maximum value- focus on them first- say, mobility. CRM users can use find, list, plan

and move stages to reduce if not eliminate the obstacles coming in way of building flexibility. So, let's say, once you find out that functionality is the most strategic feature in all (using flexibility mapping process), you list what things are posing rigidity and, working against flexibility of this feature. Plan activities to get rid of things causing rigidity by focusing on activities that will add greater value to the CRM design. Similarly, all features can be evaluated using the flexibility continuum process. This will help CRM managers to plan for building flexibility matching the users' and the designers' expectations as basis for CRM design.

6. Concluding Observations

The role of flexibility is eminent in design of a CRM solution. But the challenge is how to embed it. We must know where exactly to apply it. We started with investigating critical features of a CRM solution and ranked them in the order of importance. Our research also identified that two sets of flexibility will affect the CRM design- the flexibility of CRM process and the modules therein and, the flexibility of CRM design and its users. Basis this and our ranking, we mapped the flexibility of each CRM feature on a scale between flexibility and rigidity. Features high on flexibility were prescribed to stretch and those were low advised to control or divest, using the two sets of flexibility. For example, where flexibility of the CRM design and the users-both are high, stretch to the extent possible to include applications that will be required now or in future. Where flexibility is low for both, control by divesting the un-required. To help this process of building flexibility, we defined CRM-flexibility continuum that discuss four set of activities. Finding out what sort of flexibility will be important in moving towards business value, listing roadblocks in its way that can reduce it or push it toward rigidity, and then planning to eliminate these to move towards achieving total flexibility. Thus, an organization may choose its CRM solution based on evaluation of flexibility- the ability to customize (its process-flow) and ability to stretch (its modules), the ability to self-control (its design) and ability of its user to control (design)- to meet current and future business requirements, without causing disruption in business continuity and the profitability.

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