Fit forCommerce

eCommerce Diligence™ Checklist

Customer Relationship Management Best Practices

1. ***Evaluate customer information and management needs across all channels and departments.*** Successful Customer Management spans both your online and physical stores, as well as from the CSRs to store sales staff, to warehouse employees. Along with your eCommerce site, your CRM is becoming the nerve center of your organization. It is touched by Marketing, Sales and Operations. Give it the attention it deserves.
2. ***Creating a 360° view of the customer is difficult, but may be worth it.*** Gathering all customer interactions, issues, orders and profile data across all channels is very difficult to do, but would enable fantastic segmentation, customer behavior and lifetime customer value information to use to increase repeat buyers and convert one-timers into loyal customers.
3. ***If you can't tie all channels into your CRM, at a minimum, make sure your eCommerce customer information is integrated with order management.*** When customers call to place an order, knowing what they have in their closet that they purchased last year is valuable information that your CSRs can use to up-sell, ask about their satisfaction, or find accessories to match. All ending in higher customer satisfaction and sales.
4. ***Work with marketing to make sure they can track campaign effectiveness through the CRM.*** Make sure that your marketing campaigns are tied into your CRM and into your OMS tools so you can track effectiveness and ROI of your marketing efforts.
5. ***Think cross channel campaign effectiveness, if possible.*** Have promotions and campaigns tracked individually for online and offline versions of the same or similar campaigns. Track how offline campaigns generate offline sales, if they generate online sales, and vice versa.
6. ***Take the time to integrate with ALL your warehouse management, order management and email tools.*** To get a full view of the customer, create segments, understand customer value, you need the full picture. Even just integrating these tools from the call center and eCommerce channels will help you to understand how to sell better online. Adding other channels is even better, if possible.
7. ***Take the time during implementation to ensure all the numbers from disparate systems tie together.*** Analytics, your order entry system, your chat engines and your own lead tracking systems may define conversions differently. Double-counting (or non-counting) can completely skew analysis. Make sure, when you first implement, that they check and double check.
8. ***Use consistency in your analysis.*** Ensure your CRM data, reporting and analysis are speaking the same language and you are comparing apples to apples for a 360° view of the customer. Ideally, you'd have acquisition cost, retention cost and be able to figure out the lifetime value for customers acquired through different channels.
9. ***Identify metrics you can define and track.*** CRMs can track many different metrics; all need to be considered. Which products or promotions work best with which customer segment? How many customers return after they have an issue with our product? How many sales did I get out of the last email blast? Did it make money? What CSR metrics do you need to track to see if a CSR is doing well?