

The PointeFocus ECM Strategy

Enterprise Customer Management: Measuring the value of your CRM investments.

How PointeFocus will improve your customer strategy, your customer relationships, your innovative ability and your bottom line.

Customer relationship management (CRM) initiatives have continued to grow exponentially. While the rush to embrace CRM should be viewed with enthusiastic reception, concern should be recognized that business executives are too often sold on a technological solution that is far from satisfactory and possibly detrimental to the future success of an organization. The notion that a company can transform itself into a customer-driven business by simply buying and implementing a piece of software within its' current business processes can be dangerous.

Customers are more sophisticated

CRM is a Business Strategy:

How to select, maintain and optimize long-term customer relationship value? It is a customer-centric business philosophy and culture.

than in the past. They have more options, they are networked and they share information.

The answer to winning customers must be more than quality, more than customization, and more than technology. Organizations must have a comprehensive customer strategy and incorporate CRM concepts into their overall business processes:

- Ensuring that CRM is a part of the very fabric of the corporate mission and operations
- Extending CRM strategy to partners, affiliates and agents
- Analyzing the various roles and interactions with customers within different levels of the organization
- Knowing what works, what doesn't work and why
- Continuously adjusting strategy and processes to ensure the "well care" of customers

These are not decisions for a department head, nor can CRM be driven by information technology. Managing customer information across the enterprise is more of an

organizational opportunity than a technical solution. The organization must decide how to use the information, how to track the information, how to share the information and how current processes support this strategy.

Contrary to the claims of CRM software vendors, CRM applications are not just plug-and-play solutions. Data and process integration isn't losing its importance -- it's more important than ever and requires a tremendous amount of attention from all stakeholders. Everyone from the corporate boardroom to the operational personnel who interact with customers on a daily basis needs to be in line with the organization's strategy.

The key to a successful CRM solution is a combination of a clear vision, appropriate strategies, aligned processes,

supporting metrics, continuous assessment, and accurate changes.

The key is an Enterprise Customer Management (ECM) solution – a strategy and process that encompasses the entire customer lifecycle and the ability to measure it.

How is your strategy working?

- ▶ Can you measure the effectiveness of your strategy?
- ▶ Do you know which touchpoints your customers consider to be the most important?
- ▶ Which marketing campaigns are the most effective with your best customers?
- ▶ What is the ROI for the tools that your CRM processes use?



How will you differentiate yourself from your competitors?

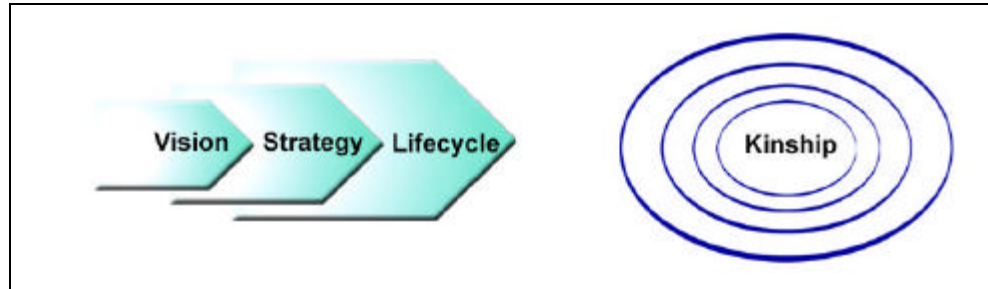
PointeTrek gives you the information and capability to identify strengths, weaknesses, and opportunities needed to exercise innovative thought and to apply useful solutions.

How PointeFocus will help you:

To help organizations gain a better perspective of the ECM concept and to measure and control the CRM process, **PointeFocus**, has developed a methodology that will enable an organization to **build, measure** and **quantify** all business initiatives that impact the customer.

Organizational managers need to understand the importance of looking at customer strategies and interactions in context. The **PointeFocus** ECM methodology addresses the broad spectrum of these issues by ensuring that the CRM strategy is incorporated into the very fabric of the company's structure and to foster innovative changes based on objective criteria that is both measurable and actionable.

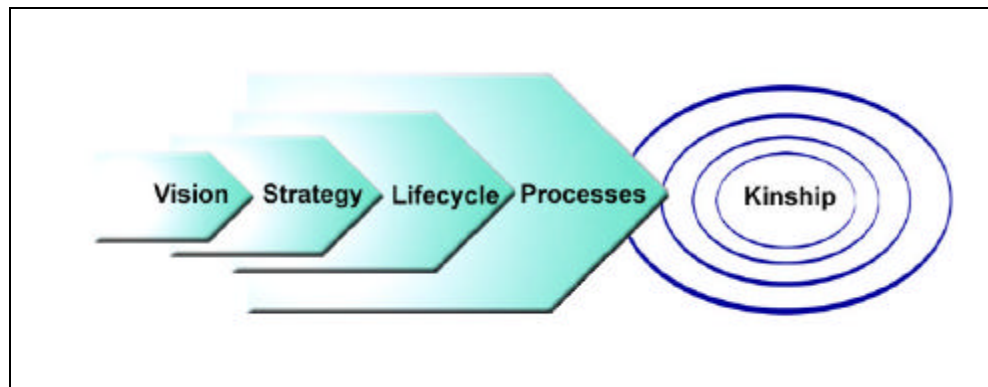
For organizations that have already embraced CRM, **PointeFocus** ECM will refine and prioritize requirements, facilitate innovative solutions, and identify appropriate customer opportunities.



PointeTrek provides the total view of the customer lifecycle.

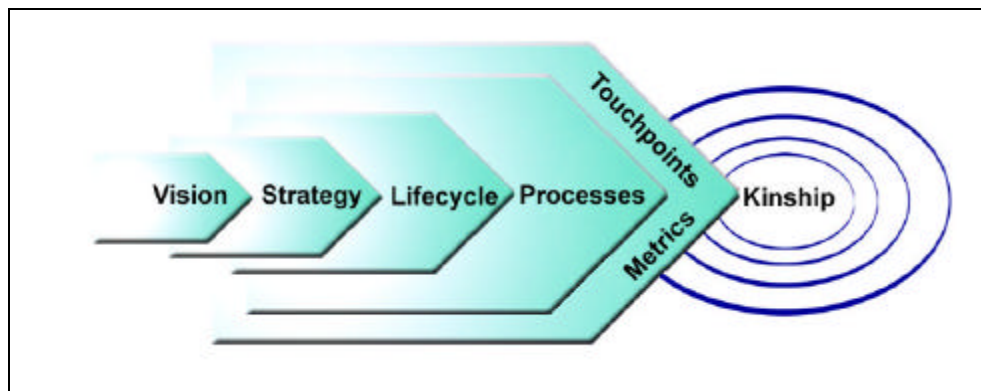
■ First, **PointeFocus** ECM facilitates the understanding and direction of the CRM process by creating a visual depiction of the customer lifecycle and providing a customer-centric view of the processes and touchpoints. This facilitates the development of the strategy by answering questions like:

- ? What does the entire customer lifecycle look like?
- ? Have you identified and segmented your customers?
- ? What organizational structures, processes and priorities affect the customer lifecycle?



PointeTrek will uncover and evaluate the entire organization's processes and services that affect customer relationships.

■ Next, **PointeFocus** ECM adds the details and builds the definition of the services and processes offered within the lifecycle. This provides perspective and understanding on how processes fit within the overall strategy and how to appropriately measure the processes. The result is the ability to establish what objectives are important, how those objectives need to be measured, ensuring value-added activities and addressing the organization's need to understand the changes which are required.



Only by measuring the right processes will an organization understand how to improve customer relationships.

■ And lastly, **PointeFocus** ECM measures the strategy and processes in context. This enables the organization to analyze the various roles and interactions within different levels of the organization and provides the ability to isolate processes and their affects. By qualifying and quantifying the affects of changes organizations will be able to analyze which business initiatives meet stated objectives. Organizations will be able to guide the deployment of priorities, create actionable objectives and ultimately create a customer-centric environment that truly supports the business goals. Both high level and detailed level views provide the ability to ask what-if questions, facilitate creative ideas, generate simulations, and provide the ability to measure the success of each change.

Many organizations are anxious to move forward on CRM initiatives. While **PointeFocus** shares the sense of urgency, we also know CRM is much more than simply a product or a service that one can buy. The fundamental changes in attitude, business processes, and information systems that characterize successful CRM implementations require careful planning, coordination, and business intelligence. **PointeFocus** is committed to facilitating this capability. By measuring your organization's strategy and process, the **PointeFocus** ECM methodology is the connective tissue between your business goals and the components that enable them, allowing you to set an innovative direction.

Customers are Changing...

Competition is Changing...

Business Processes are Changing...

Are You Ready To Set The Direction For Change?

PointeFocus... Measure, Innovate and Win!

For more information and a confidential discussion of your organization's direction, please contact:

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