Function Module Integration of CRM for the SMEs: a user experience design solution

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Abstract

The study cross-investigated the success and failure aspects of the CRM system, and it probed the development of the structure of the system and found out there were differences in execution orientation of traditional CRM and social CRM which further effect the operation and information transform problems. Especially for the SMEs, as a fast-growth economy in the decades, because they expected limited investment, got started quickly and immediately benefited, so the existing CRM system package in the market was hard to satisfy them.

Through the field survey, the CRM system vendors used the customer lifetime circle as foundation and arranged the functional modules of four types of CRM into each stage separately to solve the operation and information transform problems.

Hence, referring to the solutions of the CRM vendors and considering the demands of the SMEs, the study built the three design principles and created the adjustable and flexible function modules of the CRM system for the SMEs. And through the tree testing and UML activity diagram to verify the construction and functions modules flexible combination which is utilized in any scenes.

Introduction & Background

Even though CRM systems have already been implemented for decades, the failure executed rate is high. Because of the customer change consumption patterns, Joseph O. Chan mentioned the key reasons for failure were the business process and integration issues.

According to the literature review, it brought three discoveries. First of all, three dimensions affect the implemented result of CRM systems: process, technology, and people. Second, the types of CRM system could be categorized as strategy/collaborative CRM, operation CRM, analytical CRM and social CRM. Among that the social CRM took part as an important role to the latest CRM demand, but it had some integrated issues with others. It explained the high failure implemented rate. Third, the SMEs as the fastest-growing segment of most economies, it required a CRM system to support them effectively manage their customer. However, the existing system solutions could not fulfill their unique demands, because the SMEs lack of resources, expertise, and impact.

Thus, the study by gathering more information in the practice field to design a better CRM system solution, and friendly and easy operation mode for the SMEs to enhance the implantation rate.
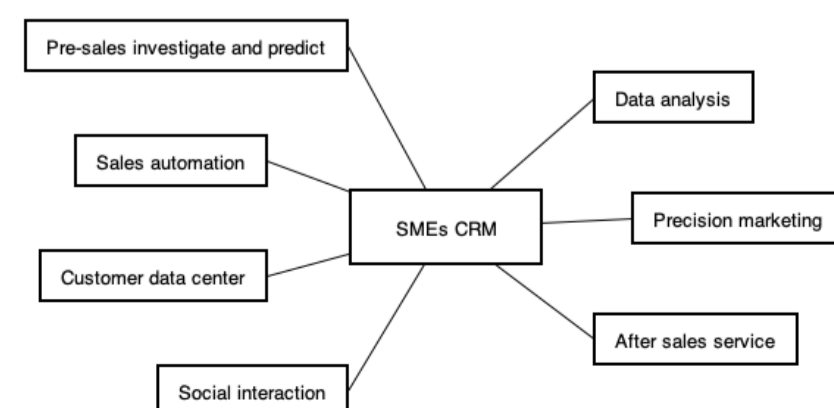
Diagram

Based on the discovery of the field research, the study built three design principles (intuitive operation, adjustable and flexible modules, contained more customer interaction) and considered the SMEs mainly function needs(data analytics, salesforce automation, and precision marketing) to create the ideal CRM system structure for the SMEs. Each module forms a complete process closed loop to realize the adjustable combination used for the target.

Specification & Implementation

The study used UML diagrams to present the scene application and user flow about the function modules. There were five activities as examples which represented different phases in the customer lifetime circle. They were pre-sale investigating activity, marketing activity, social interaction activity, repair service activity, and customer conversion analysis activity.

Among them, social interaction activity was the most important activity which represented the study of how to solve the integrated issue about traditional CRM and social CRM. The scene of this activity was to conduct an online interaction activity and during the event to motivate the customer place orders. The process included the following steps: create the basic content, selected the target group (this would switch to the customer data center module to gather the target information list), event benefit evaluation, implement the activity (it would simultaneously trigger two events: reply the questions and response from the participants, release the unique promotion products/service information), place the order which would trigger three events at the same time: confirm the order detail with the customer, build the customer information (this would connect to the customer data center), and build the order information via sales process (fill the information, connect the account, bound commodity, and payment in the sales automation module), and then the order would go to the next phase of function module, sales automation.


UML Diagram

Testing & Evaluation

The study used tree testing for the SMEs which recruited 81 people and collected 37 responses. There were 10 tasks which separately verify one function module within the scenario to solid the CRM system construction.

Task	Most selected 1st click	1st click rate	Correct destinction rate	Most selected wrong destintion rate
1	Precsion Marketing	45.95%	48.65%	21.62%
2	Sales automation	54.05%	54.05%	10.81%
3	Social interaction	54.05%	59.46%	10.81%
4	Customer data center	81.08%	67.57%	10.81%
5	After sales service	83.78%	83.78%	83.78%
6	After sales service	67.57%	94.59%	2.70%
7	Data analysis	72.97%	62.16%	18.92%
8	Sales automation	48.65%	43.24%	43.24%
9	Precsion Marketing	27.03%	56.76%	8.11%
10	Customer data center	56.76%	64.86%	10.81%

Successful rate of each task
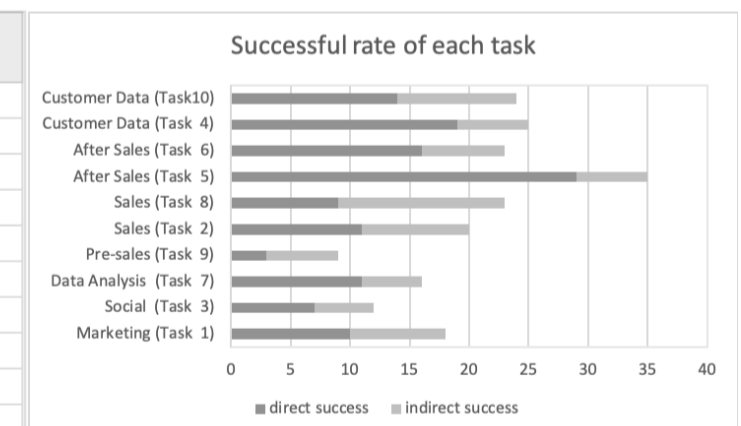
Conclusion

CRM types extend from three categories (strategic/collaborative, operation, and analytical) to four categories (extend social category), but the underlying principle of social CRM was very different from the other types, which caused the difficulty of the implementation. Thus, the CRM system solutions in the market used the customer lifetime circle as foundation and arranged the functional modules of traditional CRM and social CRM into each stage separately. But the implementation of CRM system in the SMEs market still did not take high rate, even though they had the demand on build the customer loyalty and gain the potential customer list by recommend, the main reason was unfamiliar with the usage with CRM which the existing solution provided by vendors was too complicated.

Therefore, the study built three design principles and provided adjustable and flexible function modules which referred to the vendors' solution, each module forming a complete process closed loop for the SMEs. And through the tree testing and UML activity diagram to verify the construction and functions modules flexible combination which is utilized in any scenes.