

SmartPops—Activate Your Frontline!

by Waylon Envik, AVP Software Solutions, inBusiness Services, Inc.

Between 30%-70% of CRM implementations fail to achieve expected ROI, depending on which statistics you choose to believe. Why? It's simple. CRM is more than just a technology acquisition; it is a business culture with well defined and measurable business objectives. As software goes, your CRM may be the best, but your business culture may find a disconnect from the technology and the job of servicing the customer.

"I don't have time to check CRM when I am with a customer", "CRM requires too much of my time, time I would rather spend with the customer", "I put a lot in [to CRM], but get little back", all common responses from a culture that has yet to be convinced of the value of CRM. Without convincing or without actionable plans to carry out, this culture will not produce ROI results.

CRM is the tool whereby your business culture of relationship building is defined and put into measurable objectives. Like any General, you, the General in command of CRM, already know your strategic plans must ultimately be executed at the frontline; in this case, at the point of customer interaction. The moment where your employee and customer interact is your MOO (Moment of Opportunity), where your well designed plan is put into play, where the relationship ball is either picked up or dropped. So, let's start there.

By using a frontline pop-up technology tool, such as 360 View SmartPops, in conjunction with your CRM, you can boost your CRM ROI by as much as 400-500% over the next 12 months! And at the same time, convince your employees that the CRM "get-back" is far greater than they ever imagined.

"We began using frontline pop-up technology in conjunction with our 360 View CRM about 18 months ago," reports Jason Tonioli, Vice President Marketing, Bank of Utah. "In one 12 month period, 3rd quarter of 2008 through second

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About the Author



Waylon Envik is the Assistant Vice President of Software Solutions for inBusiness Services where he oversees the continued development of 360 View CRM and its many related modules. Waylon has worked as a developer, editor, and database administrator before coming to inBusiness Services. He graduated from Xavier University with a BSBA in Information Systems, and is certified as a SQL DBA and in ASP.NET.

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quarter 2009, we generated around 2,700 referrals using frontline pop-up technology for our Go Green E-Statement Campaign. But more amazing, we closed nearly 90% of those frontline referrals resulting in over \$60,000 bottom line savings from this one campaign alone. In addition, our frontline staff received over \$12,000 in referral bonuses as a result of the campaign, creating a win-win for everyone.”

“Frontline pop-up technology is not new,” says David Seger, lead developer for 360 View SmartPops, a frontline pop-up technology tool developed by inBusiness Services, Inc. “But it still has a low adoption rate simply because it has been a misunderstood technology and traditionally very expensive. We worked very hard to develop a tool that is easy to install, has low load on your desktop, is cost effective, and easy to use. We fully believe that in 3-5 years all CRMs will rely on frontline pop-up technology as the primary means to drive user adoption and ROI.”

360 View SmartPops is an application monitoring software that can easily be installed on any workstation to monitor your web-based or desktop applications for customer unique information. Simply, you tell it what application and which fields within the application to monitor and it will do so in the background as you work. For example, let’s take a teller processing a customer’s deposit. As the teller enters the customer’s account number to record the deposit, 360 View SmartPops recognizes the numerical string entered and quickly queries the 360 View CRM database for any cross-sell or alert opportunity. If a match is found, then the system will pop a message over the teller’s current application (e.g. “Wish the customer happy birthday”, or, in the case of Bank of Utah above, “Would you like to help us go green and sign up for e-statements on your account?”). In cases of cross-sell, with one click the teller can create a referral to sign the customer up for the new service and, just like that, move on to the next customer.

If you want to ensure user acceptance and ROI when implementing a CRM solution, you will want to make frontline pop-up technology a requirement of any CRM purchase.

“This technology, when combined with CRM, will open up your marketing campaign opportunities to a level you never imagined”, concludes Jason Tonioli. “It is CRM on steroids and a must-have for any marketing executive.”

For more information about 360 View CRM or inBusiness Services, Inc., visit www.threesixtyview.com or call 866.822.6249.

About 360 View

360 View CRM is a web-based software solution that can be hosted at your institution or via the web by inBusiness Services, developer of 360 View CRM. This relationship management system imports all your customers’ core and third-party accounts and services on a daily basis while rebuilding the customer relationship into one customer view so that your customer’s relationship to others and their value to your institution are instantly recognizable. This software was developed by financial institutions for financial institutions and has been field tested, with proven ROI results, for over five years.

Key system features include:

- Sales Automation
- Marketing Campaigns
- Customer Profitability
- Goals and Incentives

