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Manage the Customer, Then the Relationship

by [Mike Berman](#)

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I start my day by going to a local gym, swiping my membership card at around 6:30 a.m. I typically mumble a *good morning* to the young lady who sits behind the reception desk; she acknowledges me in roughly the same fashion. On my way out we typically exchange similarly unenthusiastic have-a-nice-day greetings to one another. To this individual I'm little more than the guy who comes in with a bandana on his head and leaves wearing a suit.

On the morning of this past November 12 I followed my typical routine, and instantly after swiping my membership card the receptionist smiled, and with great animation chirped, "Harry Birthday, Mike!" Unexpected, pleasant, and an initial reminder of the basic things CRM can do to personalize a customer experience. But as I went through the rigor of my morning workout my thoughts wandered and I reversed my initial reaction. For 364 days a year I'm still an easily ignored guy with a bandana, and just as unmemorable as a guy leaving in a suit at 8:30. On November 12 I'm Mike, the special birthday boy.

What a sham! Not to come off as Andy Rooney, but as I hit my mid-40s my birthday is more or less a march to becoming my parents than it is a joyful celebration that includes participants like the receptionist at my local gym. If the gym wanted to build a closer connection to me, rather than voicing birthday wishes once a year, why not greet me with a "Mike, you come here quite a bit, and it's obvious you work hard, but frankly you haven't yet achieved the noticeable results you'd probably like. Here's some reading material on weigh- loss." Or, perhaps, direct me to a personal trainer.

I don't know what amazes me more, the impressive range of available CRM tools or how ineffective most organizations are when it comes to properly leveraging CRM's capabilities.

My experience is that the sell side of the equation is as guilty as the buy side, because most CRM installations are based on features and functions rather than desired outcomes. Like any tool, organizations must learn how to properly use their CRM and this can only be achieved when it is core to a strategic plan, rather than implemented as a magic bullet.

Personalized service is a means, not an objective, and in my small gym example the better use of CRM would be to build share from an already captive customer instead of extending birthday wishes. Indeed, far too many CRM providers fail to understand what their customers want, a very odd thing for companies selling closer customer contact.

Navigating CRM applications may now be intuitive, but knowing how to best use it isn't. Providers and users can do a far better job identifying the real business drivers for any CRM initiative, and if so, they are certain to achieve their objectives.

So happy birthday to all, but can anyone tell me how I can really lose the 20 pounds I've gained since college?

About the Author

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