

A KEWL PERSPECTIVE MAKES CRM WORK

Managing the human element key to successful software switch

Assante FTC, an independent regional brokerage firm that specializes in licensing financial planners, had already outgrown two contact management software packages by the time the rapidly expanding company's managers decided yet another change was needed.

According to IT manager Bob Woodhouse, a new system was needed to provide Assante's network of 150 financial planners operating throughout western Canada with more automated customer relationship management tools. He had also identified a need to improve communication and information sharing among staff and between branch offices.

"We were looking for software that had the flexibility to accommodate the needs of individual financial planners, who ranged from sophisticated users to slow adapters. The system we wanted also had to be compatible with our back office system and other software used by our branch offices," said Woodhouse.

Woodhouse had learned from past experience that finding the right software, custom or off-the-shelf, was only the beginning. There was the time and cost of transferring information from the old system to the new

one, training users, and obtaining ongoing technical support for the inevitable fine-tuning or adjustments.

The IT team at Assante finally decided to go the third-party route, and turned to Kewl Consulting for help with the whole process.

KEWL TOOLS – THE EASY WAY TO CRM SUCCESS

All the benefits you've heard about CRM...

- Increased productivity
- Less paperwork and duplication
- Enhanced communications
- Streamlined business processes
- Easy generation of valuable reports and statistics
- Powerful one-to-one relationships with prospects and customers

...are all achievable.

And the horror stories? They are all avoidable.

Finding the right system for today – and tomorrow

Kewl Consulting president Diana Llorentes said that more and more companies, large and small, are hiring independent software consultants to modify their systems or to choose and implement new ones.

Independent, she says, is the operative word.

"Our clients do not want to be boxed into any brand of software. They want us to set up their database, or back

end system, so that they can easily change the front face of their system later on," she said.

Simply put, a database is the storage container that the software application is attached to. The software is the front face, or what the user sees.

"You can easily attach a good, solid database to another application in the future. We are very cognizant of the need for open architecture."



Assante

Providing Clients With Integrated Financial and Life Management Solutions^(TM) ■



VALUE PROPOSITION

We differ from other consultants and technology professionals in several ways:

First of all, we're proactive. We don't just show up with a blank sheet of paper and ask you what you need. We suggest ideas and make recommendations based on our successful CRM experience with companies similar to your own. At Kewl, we bring you "Tier 1" thoughts and strategies that can be executed within budget and short timeframes to provide the value and corporate effectiveness you desire.

Secondly, we're tactical. We operate like a 'boutique firm' with a cohesive team of individuals who excel in complementary areas of CRM implementation. We have all the expertise and resources you'd expect to find with larger consulting firms, but with a much more hands-on, practical approach. We don't just suggest ideas. We help you make ideas work.

Thirdly, we take ownership. We coordinate with your project team with a focus on achieving objectives, not just delivering services. Every project we handle is our signature. So we're as committed to your success as you are.

Finally, we have the success formula. We know, from our years of experience, with hundreds of clients, the best practices for taking your CRM program where you want it to go.

The IT team at Assante had figured out it was too expensive to rely entirely on a software dealer or manufacturer for training and technical support.

"We didn't want the cost of 100 users phoning a help line to ask the same questions. We knew that training was very time

consuming. We wanted to do most of the training in-house, but needed some outside help to train the trainers," he said.

According to Woodhouse, the company's in-house IT team had neither the time nor the resources to write their own software. Nor could they find off-the-shelf software suitable for their industry or their company.

After meeting with company user focus groups, Kewl helped Assante choose a software package and then customized it to meet the company's needs. The database was bridged with proprietary information in such a way as to facilitate subsequent software changes or modifications.

The Kewl way of managing change Kewl is quickly developing a reputation for its ability to manage the human issues involved in introducing new technology to the workplace.

"What we do goes well beyond the issues of application features and installation of software. A key component in managing change is the human element. Training is a big portion of what we do. We also mentor people responsible for the project. We tell them what the biggest obstacles to change are, where the plateaus are, and how to take people to the next level," said Lorente.

According to Woodhouse, training was a key component in the successful implementation of the new system at Assante.

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Woodhouse hired Kewl to work with the trainers who were sent to individual offices to conduct hands-on training. Part of the post-installation arrangement between Kewl and Assante includes onsite and telephone support for a set fee. User questions about the new system are filtered through Assante's IT department to avoid duplication, and to develop in-house expertise.

"Our financial planners find the new system easy to use and tell me it has helped to improve their relationships with their clients."



When the installation of the new CRM software was completed and the re-training was well underway, Kewl shifted into a support role for Assante.

"Kewl is there to make sure things continue to run smoothly whenever we run into a technical roadblock. Our financial planners find the new system easy to use and tell me it has helped to improve their relationships with their clients. That was, after all, the reason we made the change," said Woodhouse.

For more information about Kewl Consulting e-mail us at info@kewlconsulting.com or call us at 604.261.3188.


Kewl Consulting

CRM SUCCESS STORY