(U) CRM Technology Pilot Receives Positive Feedback

FROM: ███████████
Customer Engagement Program Manager, S11
Run Date: 08/04/2004

U//FOUO) A new Customer Relationship Management (CRM) system was piloted in SID's Customer Gateway last quarter by customer Account Managers in the Law Enforcement/Homeland Security pillar*. The aim of the CRM system is to allow people across SID and eventually the Extended Enterprise to share information about customers easily and to provide automation support for customer service processes. During the customer account management pilot, six Account Managers applied contact management and account management functionality of a commercial tool suite to their day-to-day jobs.

(U//FOUO) Initial feedback from the pilot users suggests strong support for the system. Users indicated that they are very favorably impressed with the application, particularly as regards their ability to improve overall work efficiency and effectiveness. Pilot users expressed contentment with having access to a central source of customer information such as contact and activity history, and with the fact that it was easy to share and access data amongst the other Account Managers using the system.

(U//FOUO) Additional system functions that Account Managers found to be helpful in performing their duties include:

- Easy generation of their biweekly "Highlights Report"
- Tracing a contact's position, organization chart, role, phone numbers, and e-mail address
- Accessing previous activities within a customer's record
- Accessing activity history to view events/activities that other Account Managers have been involved in
- Ability to document and track issues, including quick checks on issue status
- Ability to query specific fields and produce a report--on screen or printed (e.g., action items by date)

(U//FOUO) Given the apparent initial success of the CRM system, the CRM implementation team is preparing to extend system capabilities to account managers in the other customer pillars, to external representatives, and ultimately to other managers in the Product Lines and the Extended Enterprise who have a need to exchange information about customers.

(U//FOUO) For more information on the successful CRM technology pilot and plans for the future of the system, please contact ██████████████ S11 Technical Director, on ███████████.

(U)Note:
* A pillar is a grouping of customer agencies