

# CRM Call Center IPT Business Case Introduction

The focus of the CRM Call Center IPT was to examine the current state of SFA call center operations and recommend improvement opportunities. Major milestones include current state assessment, industry best practices, a GAP analysis, a recommended solutions document. Through the work accomplished by the CRM Call Center IPT, several major themes surfaced including the need for the following components:

- Streamline call center environment
- Improve CRM process and procedure components
- Establish one contact point per customer base
- Implement a common CRM application

The CRM Call Center IPT recommends streamlining the current call center structure and processes into a consolidated Customer Interaction Center (CIC) environment. A central IVR will provide one toll-free number per customer base to access automated account information or be routed to the appropriate customer service representative. The CIC synchronizes customer input channels (web, phone, fax, e-mail, paper correspondence, etc.) through a universal queue with back-office operations and a CRM application, giving employees a comprehensive view of the organization's relationship with its customers. This will open internal systems to encourage and increase customer self-service.

Consolidating the existing call center structure into a CIC environment will reduce customer service fragmentation and drastically reduce costs. The recommendations provided in the business cases are estimated to conservatively save SFA approximately \$30 million annually post implementation. Further research will be needed in the detail design phases before implementation plans and more accurate cost/benefit information can be determined.

The following business cases provide more detail around the necessary components for the CIC environment:

- Call Center Optimization
- Central IVR
- Common CRM Application



