

WHAT TO LOOK FOR IN A CRM MARKETING PARTNER

Brian Redden
Vice President, Sales & Marketing
Research Data, Inc.
Brian.Redden@researchdata.com

EXECUTIVE SUMMARY

For prosperous growth, businesses must embrace ways to relate with their customers in ways that speak to customers' individual interests. Unfortunately, many organizations insufficiently provide the infrastructure and/or lack the resources to effectively implement Customer Relationship Management (CRM) programs. As a result, companies look outside their organizations for partners that provide expertise in these services. Research Data, Incorporated (RDI) is a recognized leader in the field of CRM marketing. Based on RDI's experiences in this area, we have outlined several key attributes to look for in a CRM marketing partner.

EXPERIENCE

We strongly believe the most important characteristic of a CRM partner is experience. For example, RDI has been providing these services to our customers for nearly twenty years. The knowledge that we have gained through our experience is a valuable tool that we leverage to your advantage. Our principals have decades of combined experience across multiple industries and disciplines.

ANALYSIS

A professional CRM partner takes the time to understand your business goals and objectives. At RDI, each project begins with a thorough analysis of the business problem to be solved.

TECHNOLOGY

Technology is the driving force behind today's successful CRM campaigns. RDI is constantly researching and investing in technology. We strive to take our customers to the next level through our technology leadership.

PEOPLE

A progressive organization continually invests in people. RDI seeks the best and brightest people in the industry to join our ranks. We have invested in dedicated project management professionals who make sure your project is delivered on time, within budget, and without errors. We would strongly suggest that you ask any prospective CRM provider how their project management process works before making a partnering decision.

SECURITY

Customers are extremely mindful of their privacy and security. From our modern, secure facility to clustered servers in our state-of-the-art data center, RDI takes the security of your information seriously. All of our associates must undergo a criminal background investigation, drug testing, and even a credit check before being offered employment. We meet or exceed the stringent security requirements of our customers in the banking, medical, and insurance industries.

RESOURCES

A qualified CRM partner must be able to provide a "one-stop-shop" solution, from "host to post". From hosted applications and web sites, to full-color digital printing, to an efficient mailing and fulfillment operation, RDI has the resources to deliver comprehensive campaigns for our customers.

RESULTS

A successful CRM partner has the ability to test and measure the effectiveness of the programs it designs and implements. Otherwise, you would not know how effective your survey or CRM marketing program has been. Testing and measuring also allows RDI to determine ways in which we can save our clients time and expense, by focusing on the issues that provide the optimum business results.

CONCLUSION

Implementing a successful CRM marketing or survey campaign can be a challenge for any organization. In many cases, outsourcing these programs to a competent service provider has significant advantages over implementing them internally. By selecting an experienced and capable partner like RDI, you can be confident that you have made a sound choice. We can help you decipher what works and what makes the most sense for your scenario, budget, and timeline.