

CRM & The Human Element

**(An example of how the mathews partnership
contributed the people dynamics integration into to
the content of a large scale CRM programme using
the FIRO Elements model)**



Proposition

The roll out of a CRM system with a 1:1 and Customer/Account focus features means that training is very important not just for “IT” navigation and administration (reports, plans etc.) but also for effective learning about customers and selling to them on the basis of an ongoing relationship



Training Elements (1)

- 1:1 Marketing training
 - 1:1 Principles
 - IDIC cycle and Account Management process
 - 1:1 Marketing and relationship building
- Relationship building (FIRO/Elements model)
 - Understanding inter-personal needs and relationships
 - Diagnosing and managing customer behaviour in the sales situation
 - Managing yourself while selling
 - Gaining access, persuading, building trust and loyalty through managing inter-personal needs



Training Elements (2)

- The Account Process
 - Profiling
 - Segmenting/Targeting
 - Planning
 - Measuring and reporting
- CRM Navigation and use
 - Account Management
 - Customer Management
 - Territory Management



1:1 Marketing and FIRO/Elements Relationship Building

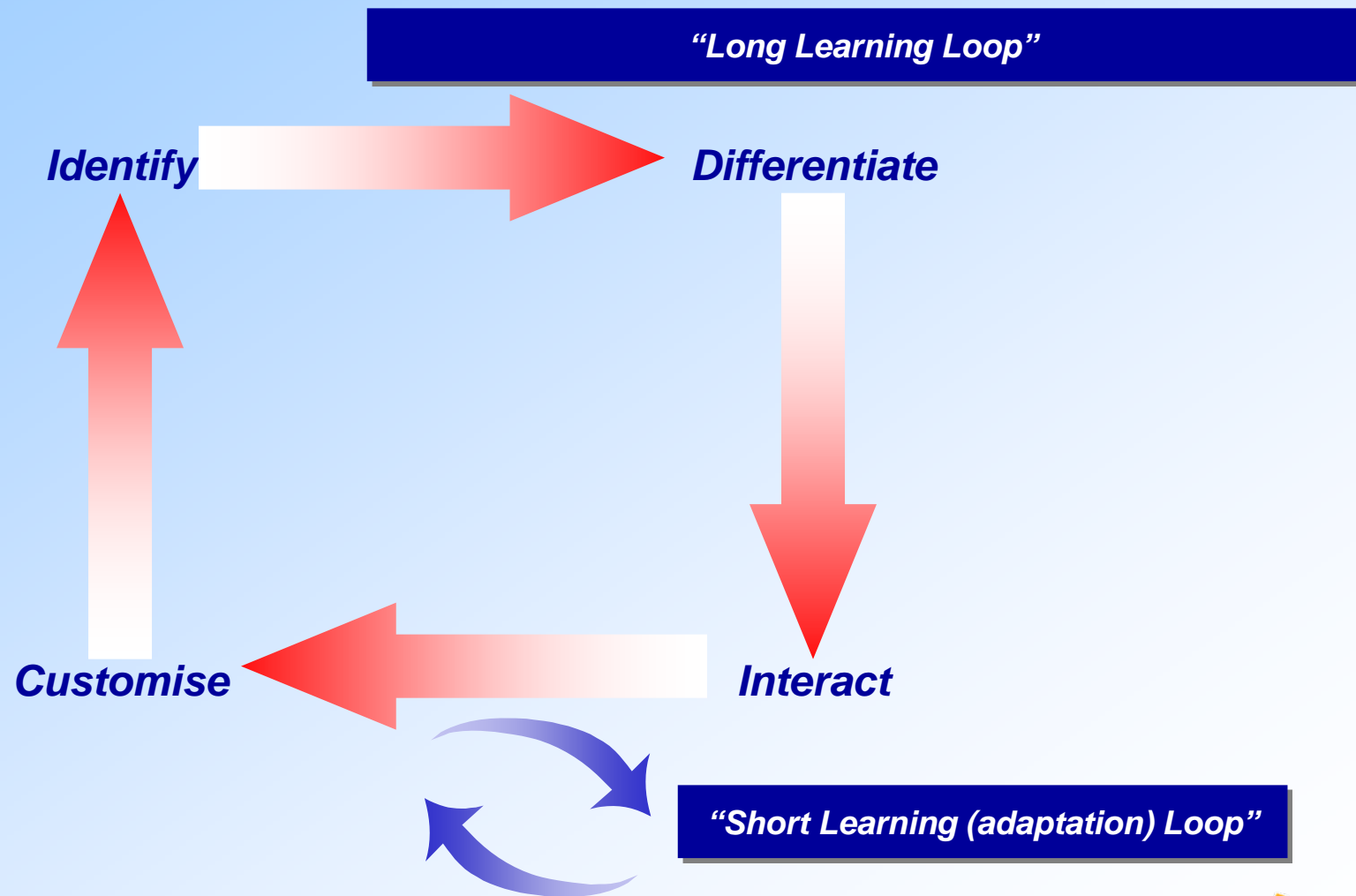


Objectives of this session

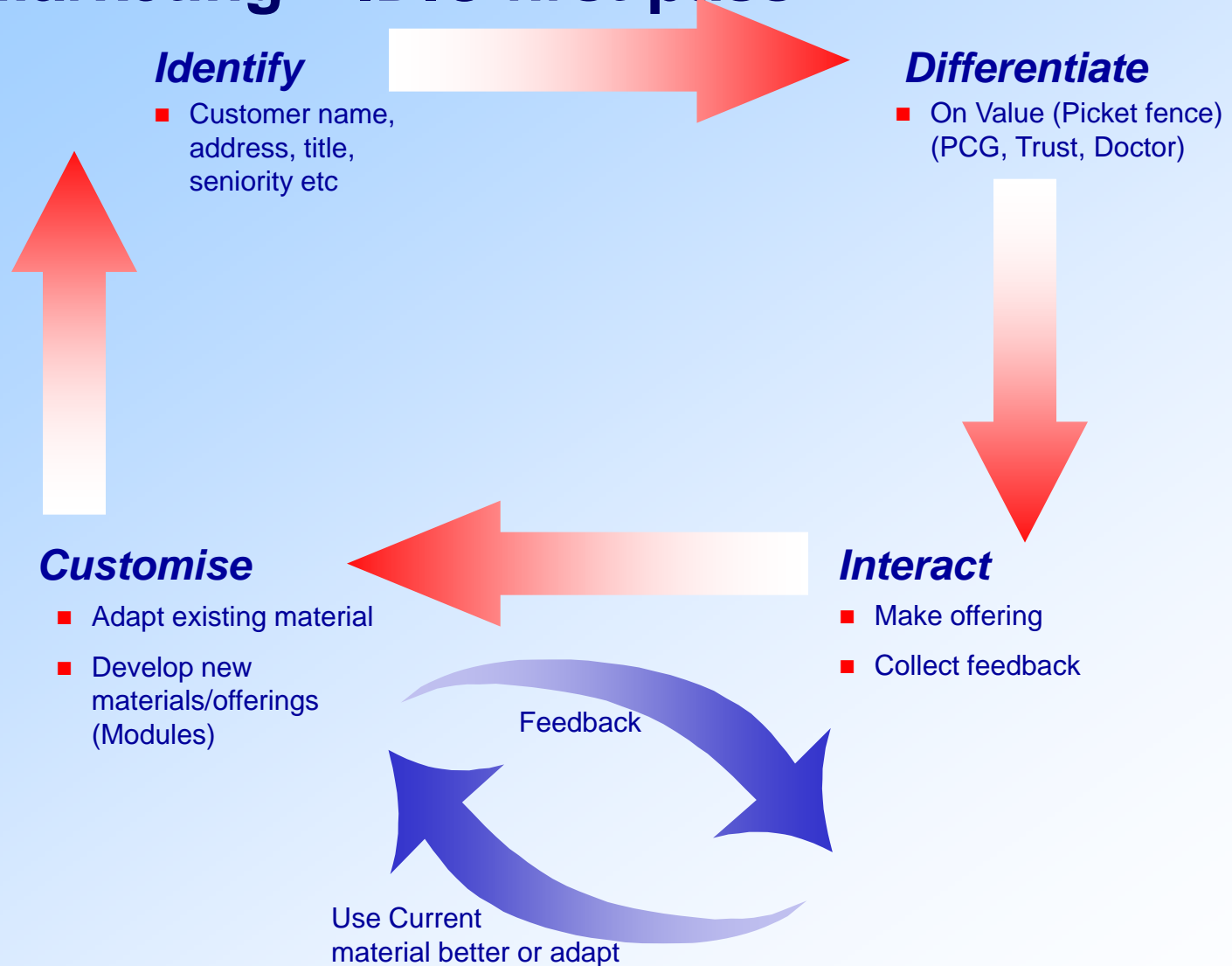
- To discuss Peppers & Rogers 1:1 model and it's implementation
- To introduce and discuss FIRO/Elements Inter-personal needs model
- Agree way forward



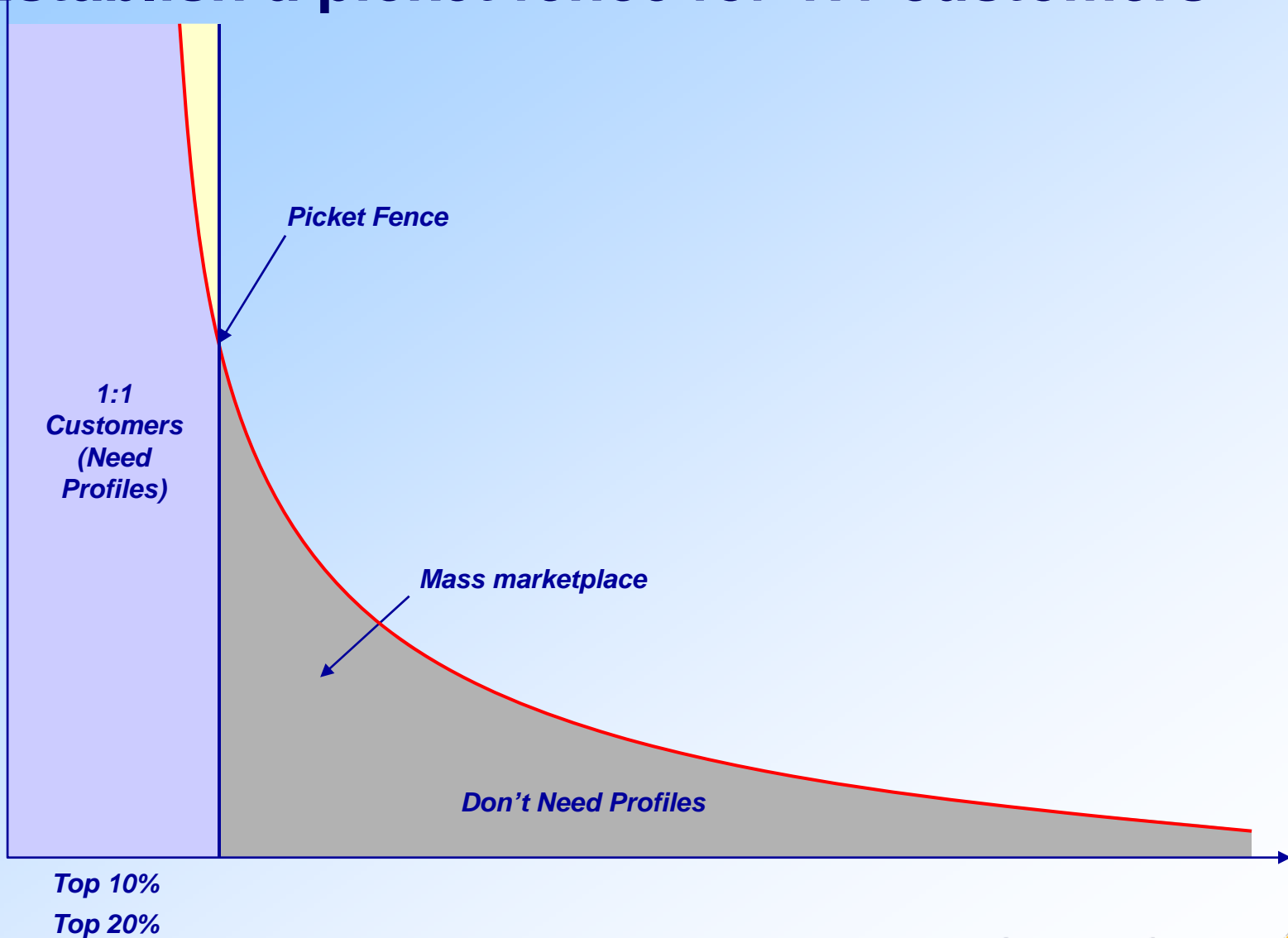
1:1 Marketing – The IDIC Cycle



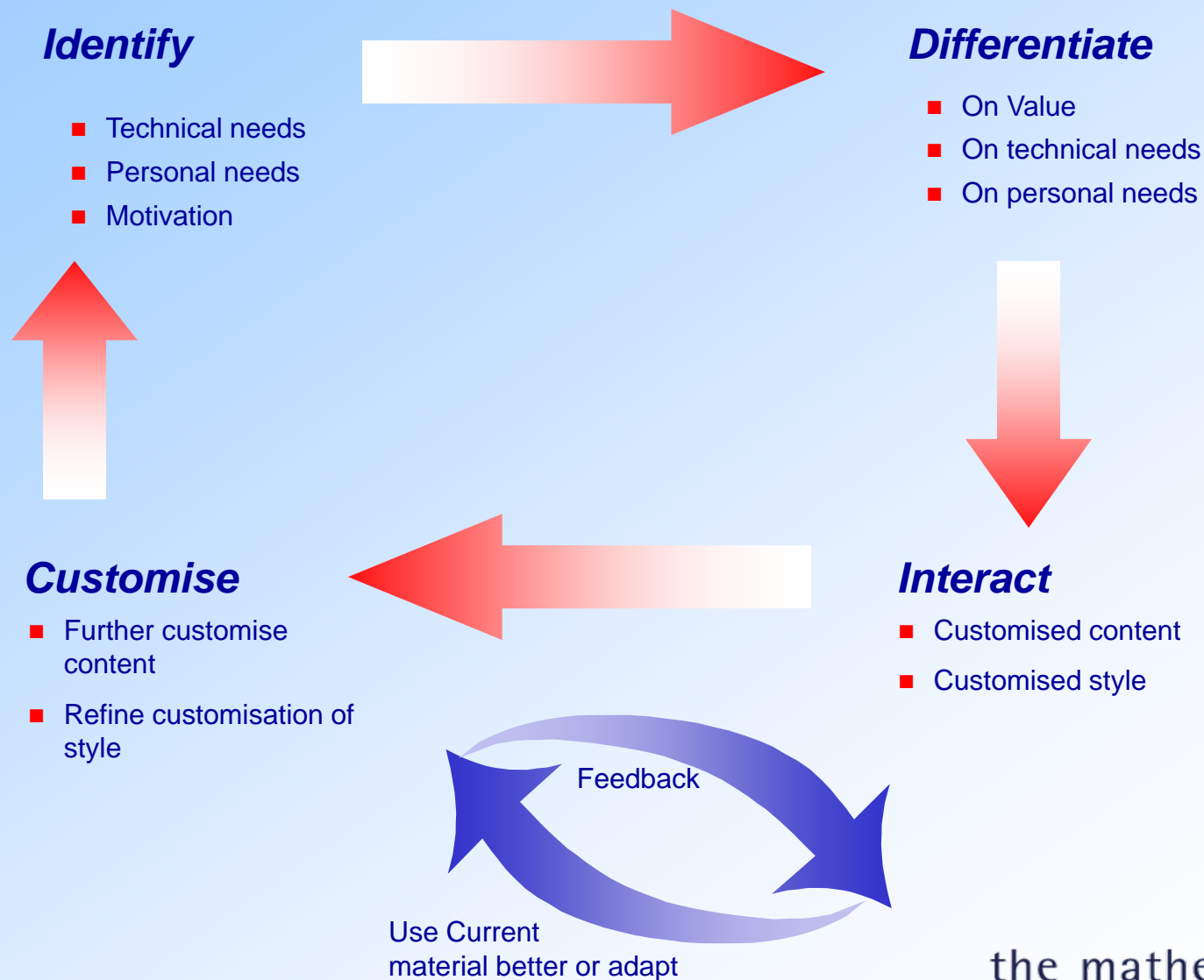
1:1 Marketing – IDIC first pass



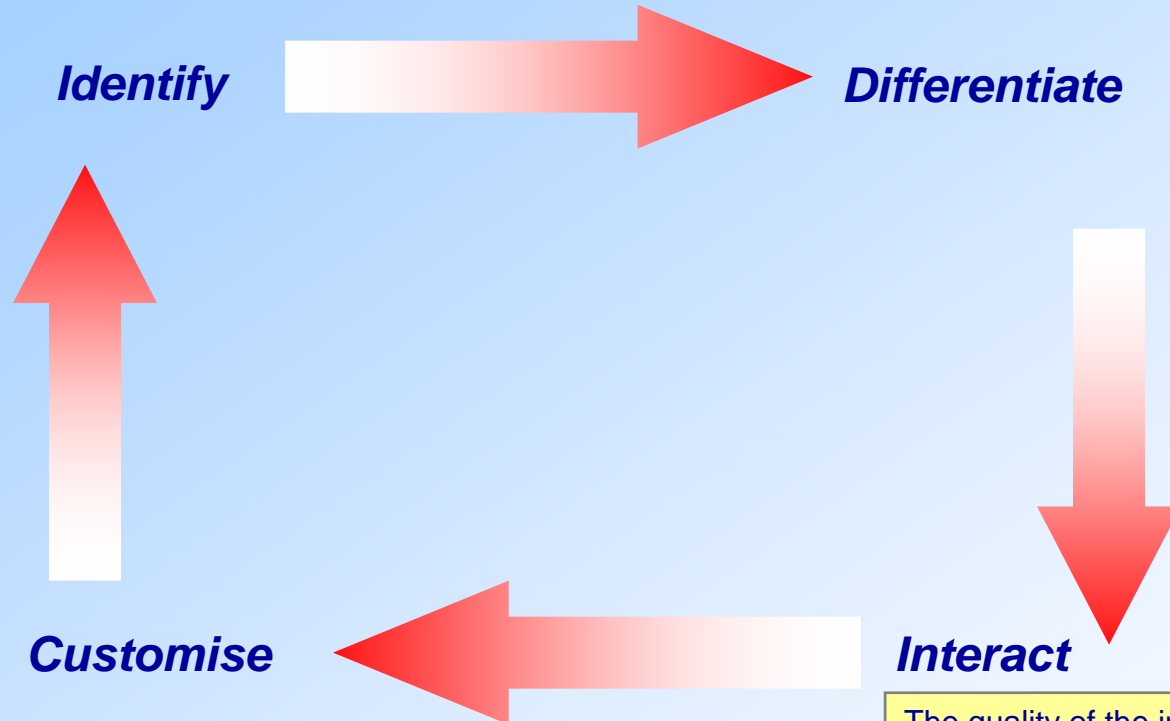
Establish a picket fence for 1:1 customers



1:1 Marketing – IDIC second pass and onwards



1:1 Marketing and relationship building



The quality of the interact phase is the main limitation on this cycle - and technology cannot help

- Customers need to be open and tell the truth if you are to succeed
- Sales people need the "right to return"
- Inter-personal needs are key

the mathews
partnership



The FIRO/Elements Interpersonal model

- Established in the psychological literature since the 1950's
- Mainstream inter-personal model with associated psychometric instruments only available to qualified personnel through psychological “test houses”
- FIRO has been extensively used for:
 - Personal development and executive coaching (long before a fashion for EQ!)
 - Team productivity and development work
 - 1:1 relationship counselling including marital and bereavement applications
- FIRO/Elements comes from the same “Humanistic” school of psychology that led to NLP which is the leading “advanced sales” methodology but is more profound and simpler
- FIRO/Elements is now being applied to sales relationships

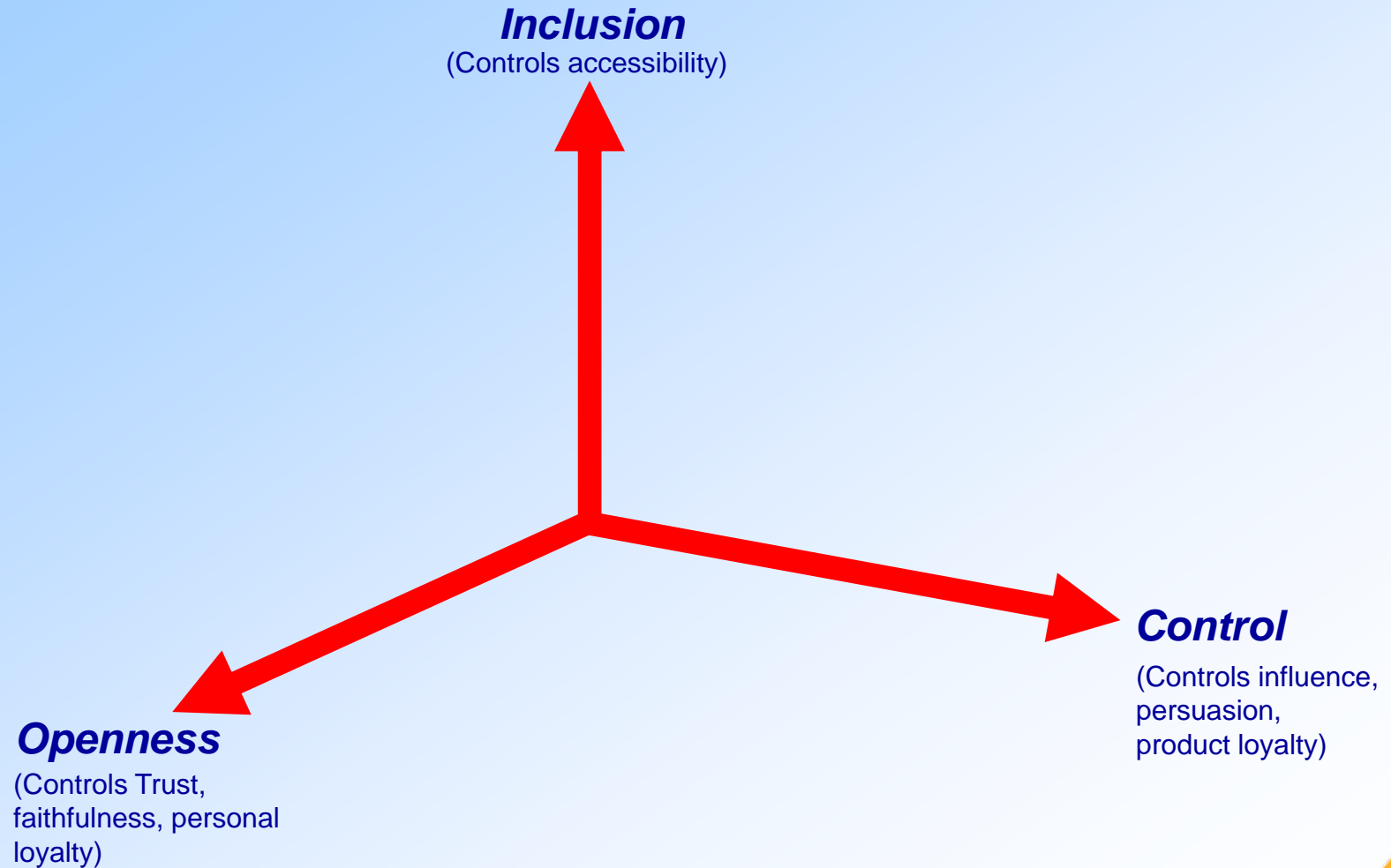


FIRO/Elements – Some previous and current application

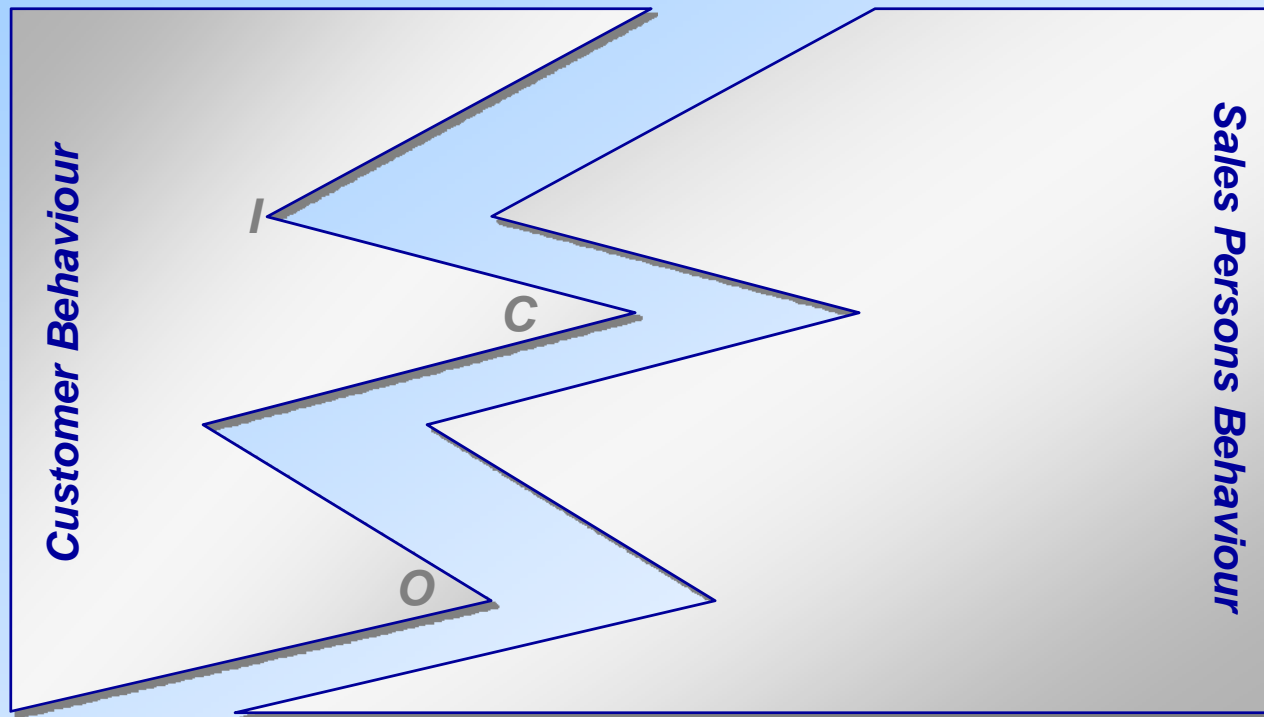
- Past Application
 - NASA – Challenger shuttle aftermath recovery
 - P&G Personal Care – TTM down from 19 to 14 months
 - Schneider Electric – Sales force reorganisation
 - 3M - Conflict resolution
- Current other work
 - Pharmaceutical sales teams (top 10 Pharma)
 - Internal relationship building and selling within Pfizer Inc.
 - Change management for Six Sigma Black Belts and Breakthrough Champions



FIRO/Elements – A three dimensional theory



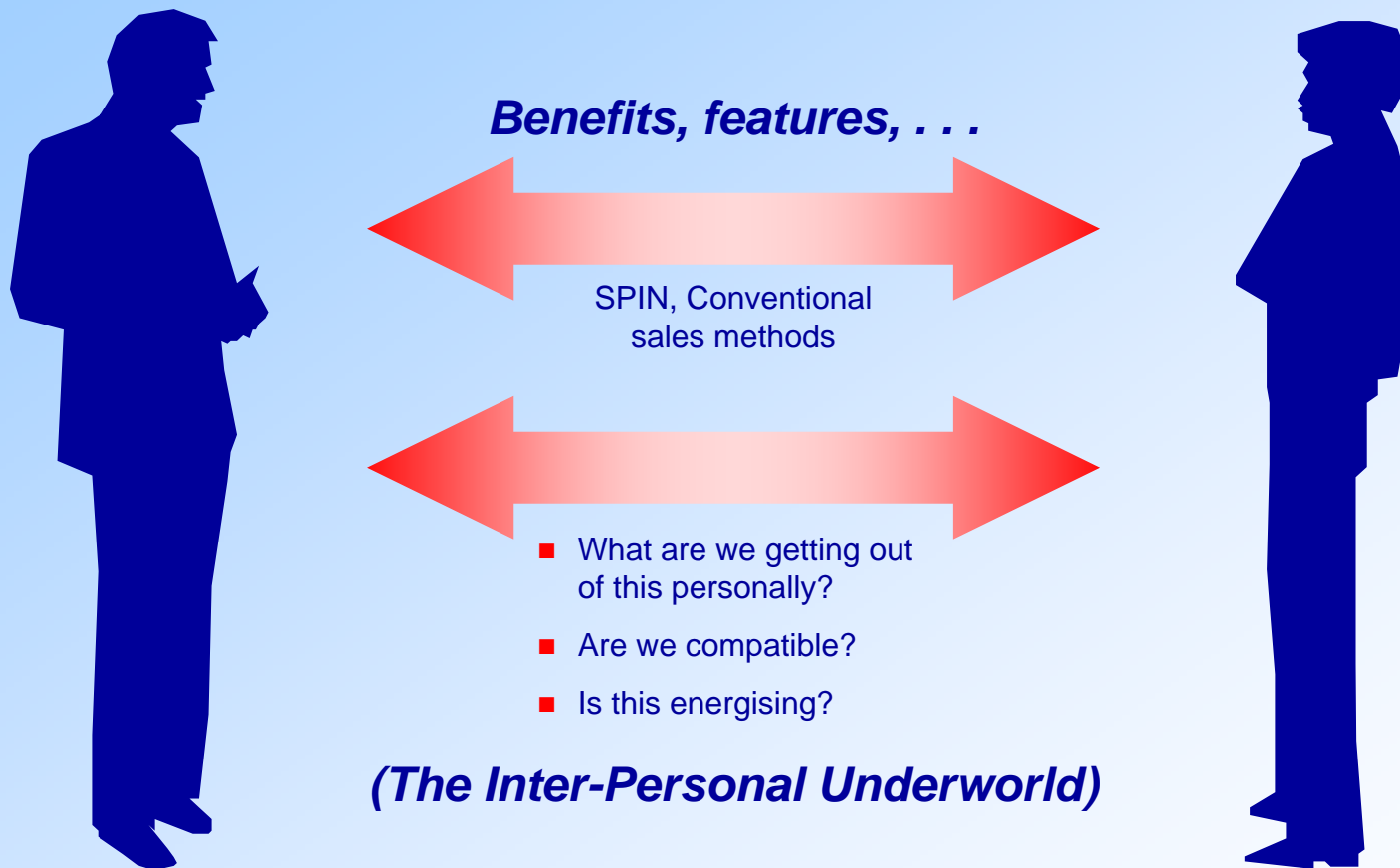
Compatibility with your customers needs is the key



High compatibility = High productivity of relationship



Managing the quality of sales interaction



Two agendas - both need managing for optimum productivity

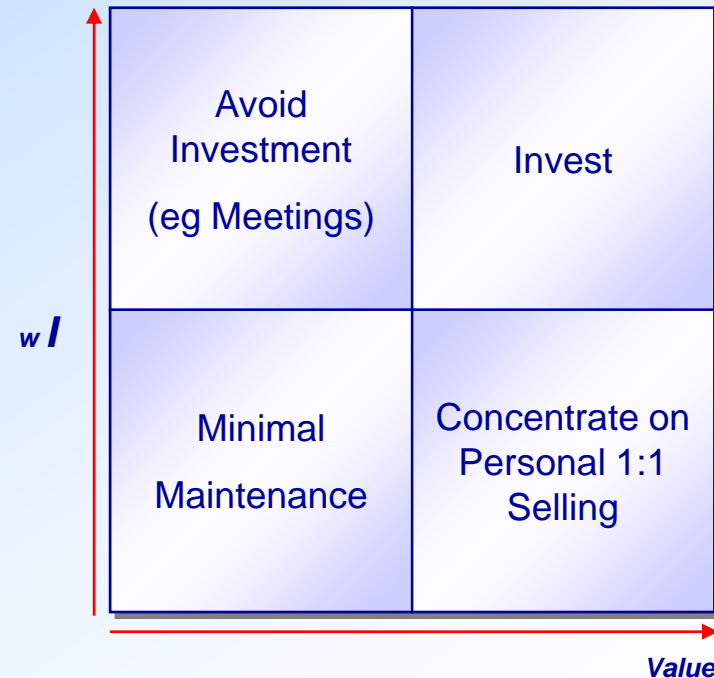
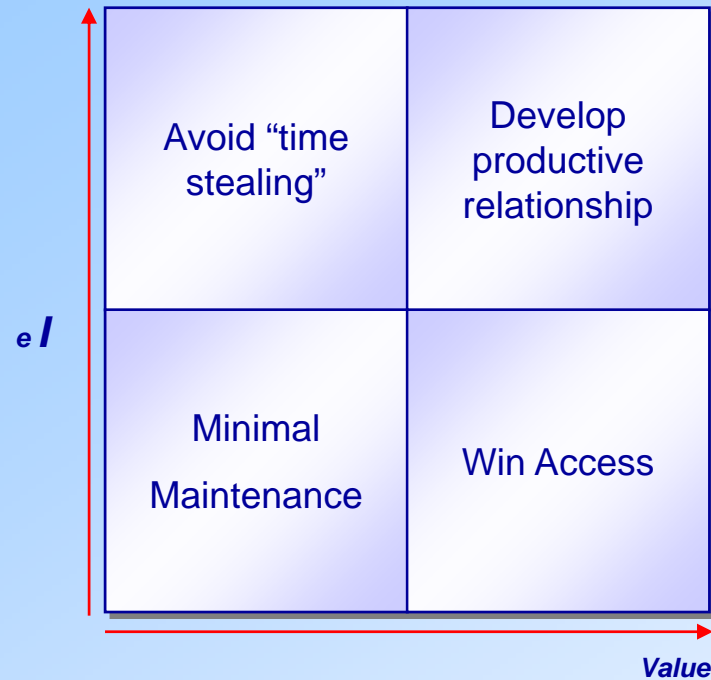


Learning to Manage Inter-personal needs in the sales situation

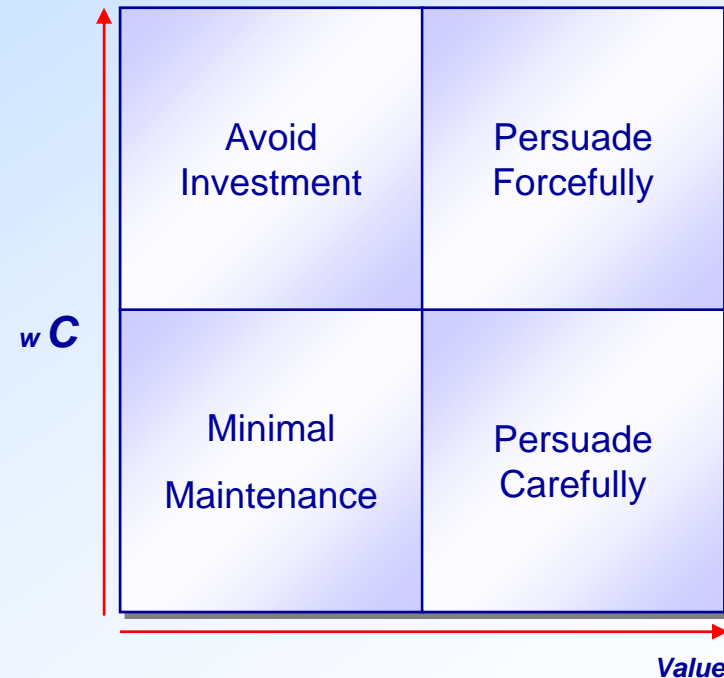
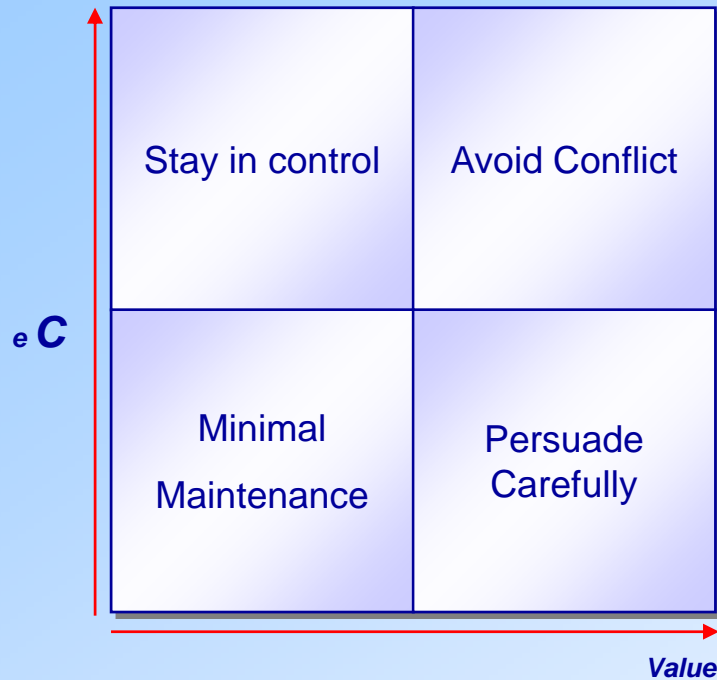
- Spot your customers needs
 - From clues in décor, dress, language, gestures
- Be aware, and become more aware, of your own needs and behaviours
- Learn to decide when and how to “flex” your standard behaviour



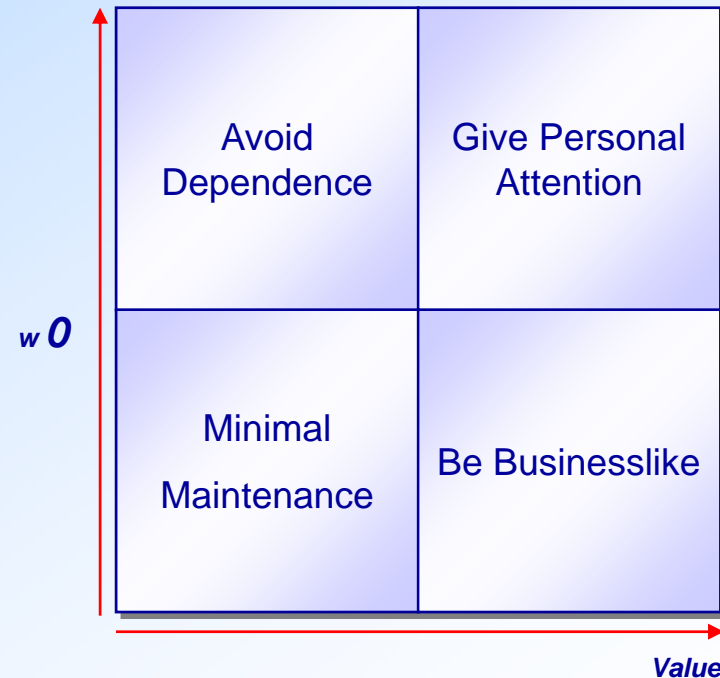
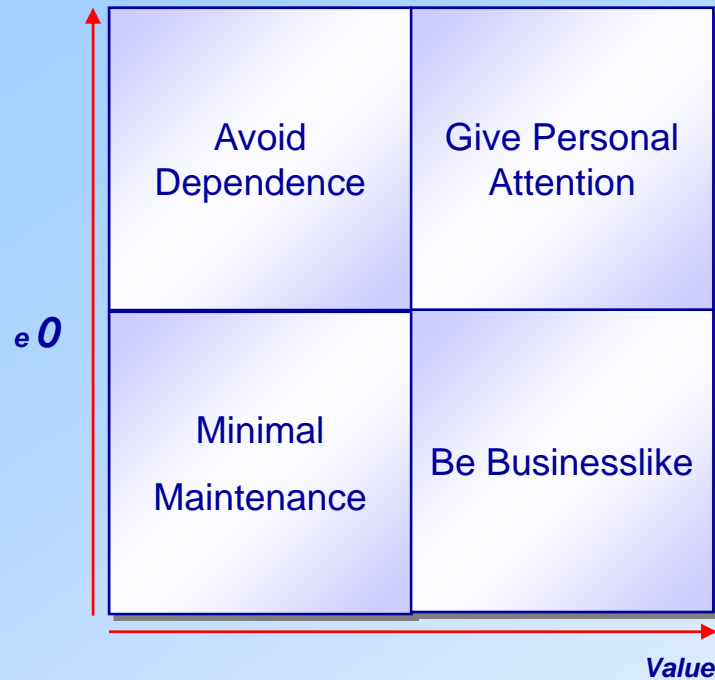
Managing the sales interaction: Inclusion



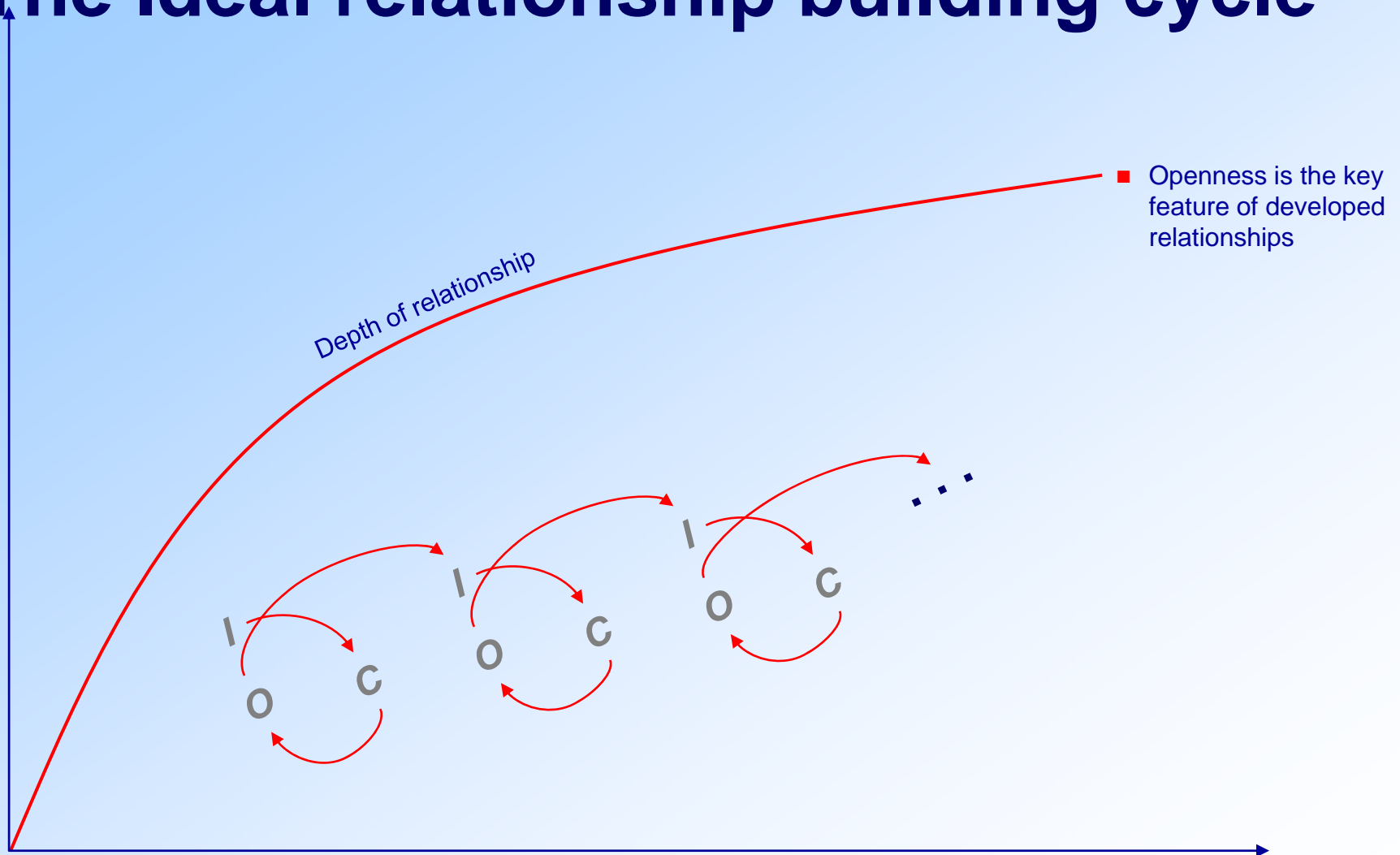
Managing the sales interaction: Control



Managing the sales interaction: Openness



The Ideal relationship building cycle



Being aware of yourself and the need to “flex” with customers

- What preferred or habitual behaviours do you have?
- What Inter-personal needs of yours are you seeking to meet?
- When I do my job am I meeting my needs or the customers – do I know?
- How flexible am I and which situations are hardest for me?



Limiting Behaviours

Inclusion

- Over social / Under social
- Salesmen are classically very social, often much more so than their customers – are you meeting your needs or theirs by socialising? How do you tackle reclusive “no sees”

Control

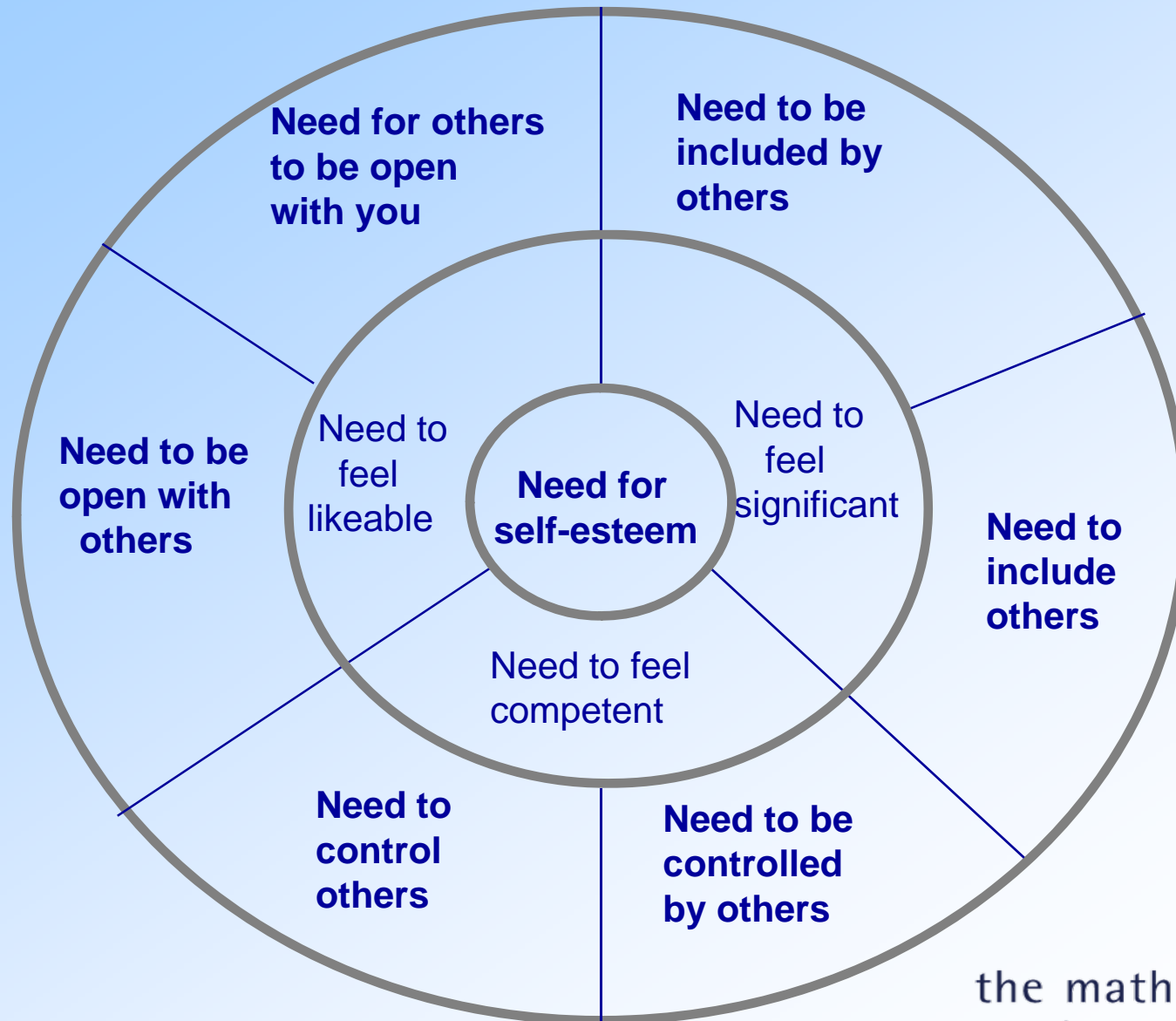
- Autocrat / Abdicrat
- How often do you “tell” when selling, do you spot when it isn’t working? How do you persuade the unconvinced and when is it worth it? How do you spot the “cushion” customer who will switch easily?

Openness

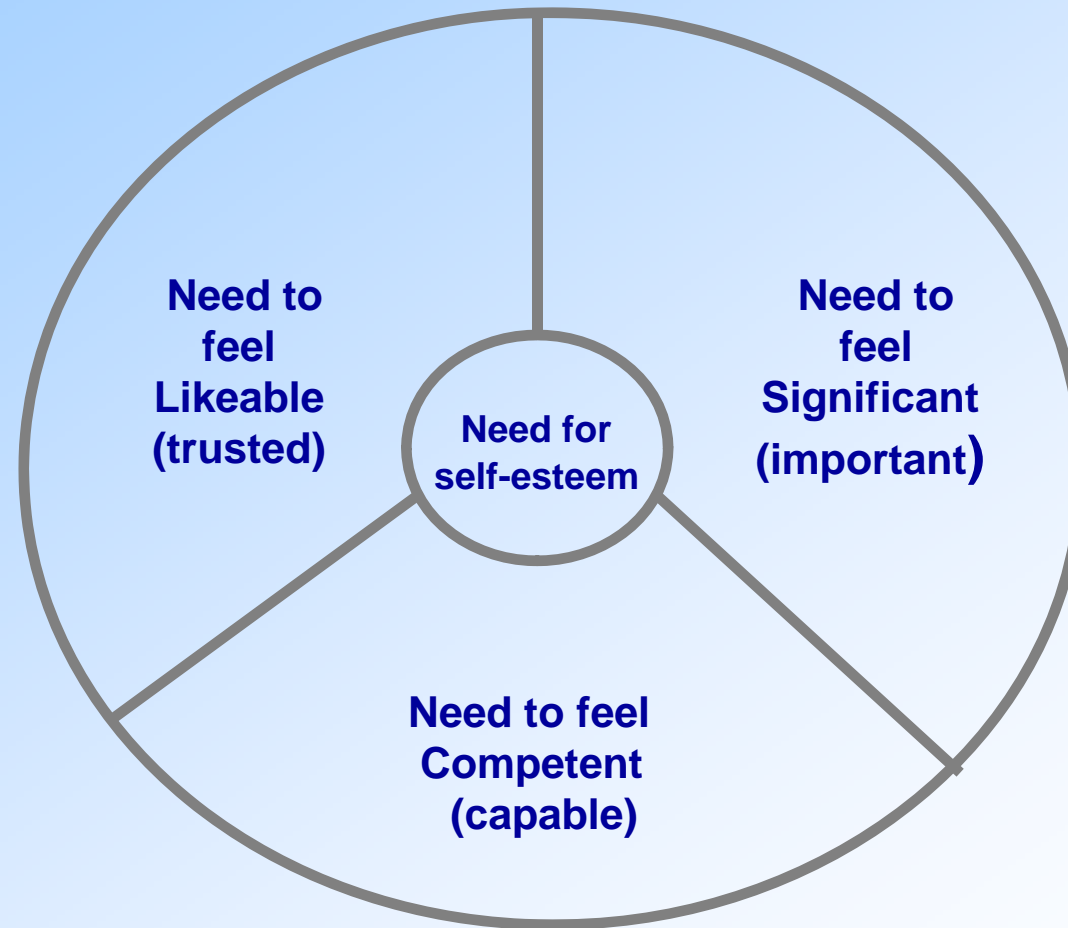
- Over personal / Under personal
- How well are you doing in this relationship – what kind of information is disclosed – is it truthful? Why do some customers trust you more than others? How do you adapt to “personal” or “Business like” styles



The Sources of limiting behaviours

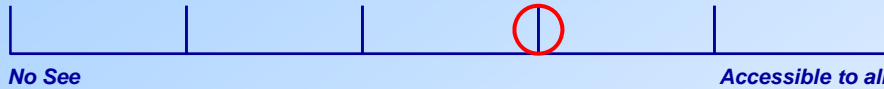


Three Elements of Self-esteem

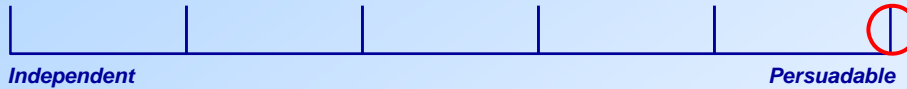


Tracking relationship status with CRM

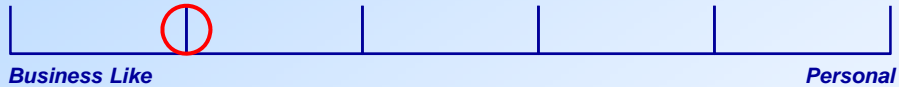
Inclusion
(Accessibility)



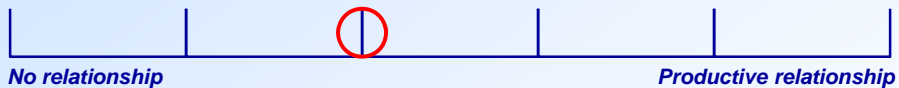
Control
(Influence)



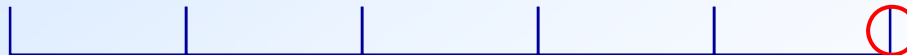
Openness
(Disclosure)



Team Member 1



Team Member 2



Way Forward?

- Training Event Design
- Full Costing
- Plan for development and delivery
- Decision points and decision makers

