Campaign Management Solution Implementation

Critical Success Factors for Automating Revenue-Generating Processes

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Introduction

Successfully automating Campaign Management is not easy. The introduction of a Campaign Management solution into an organization changes the way key revenue-generating activities are conducted. Organizations accustomed to traditional application development initiatives will find Campaign Management implementations are very different.

As with most development initiatives, business users and technical resources are required to work together to implement new processes, in this case for campaign design and execution. However, with Campaign Management, these groups must look at processes and customer data under a microscope, often for the first time and *always* with surprising results. The technical data providers and the business users of the customer data will have entirely different views regarding specific data elements including what the data means, how it should be used, and how accurate and timely it is or needs to be.

A second major difference of Campaign Management versus traditional application development is that the solution must be adopted — it cannot simply be "turned on" as would be the case with a desktop or self-service application. In almost every case, the new Campaign Management will be replacing an existing process. The users of the current process can simply decide not to use the new process, even after it has been delivered.

The goal of this paper is to help organizations maximize the Return on Investment (ROI) of Campaign Management implementation by exploring the key challenges involved with the implementation of Campaign Management and identifying methods of managing these challenges to achieve success quickly and effectively. There are many critical success factors involved in any Customer Relationship Management (CRM) effort. They include the more obvious project management considerations as well as technical and process elements that are central to a successful implementation effort. This paper will focus on five critical factors for successful Campaign Management implementation: Collaboration, Change Management, Data Quality, Developing Experience, and Operational Accountability.

To illustrate these success factors, we will compare and contrast two actual Campaign Management implementations from the telecommunications industry.

Case Study: A Tale of Two Telcos, part 1

Background. In this case study, we compare and contrast two organizations from the same industry vertical — telecommunications — implementing the same Campaign Management solution.

In both cases, the companies wanted to achieve reductions in customer churn. Firm A was also interested in reducing campaign development cycle times and empowering the Marketing business unit. The Marketing business unit was the primary sponsor of the project, while Information Technology (IT) took a supporting role in the project.

Firm B on the other hand was focused more on technology modernization and standardization as well as expanding the role of Campaign Management into a larger component of the overall vision of unified client contact management. In this instance, IT was the primary sponsor of the project while the loyalty and retention business unit took on a support role.

Collaboration

Like it or not, implementing Campaign Management solutions is a team effort, bringing together a wide variety of business users and technical resources. The team members from these two groups will generally have very different perspectives. On the business side, Marketing organizations are often focused on being exceptionally responsive to changing market conditions and place a high premium on the ability to react quickly whenever required. On the technical side, IT organizations often take their data stewardship and architectural responsibilities very seriously. These two perspectives may at times come into conflict, however, both groups possess knowledge, skills, and resources that the Campaign Management initiative will need to be successful. On the business side, some participants will understand the data while others might understand current processes, and still others could be experts on the market segments involved and the campaigns that will be effective within these markets. On the technical side, the data architects and ETL (extract, transform, and load) developers who provide and manage the data, as well as application developers who provide the interfaces, may have limited understanding of how data will be used in campaigns and why accuracy is so important.

Effective, cross-functional collaboration of these business and technical sub-groups, with their various backgrounds and perspectives, is critical to the success of Campaign Management initiatives. During the initial period, both groups will need to work closely and cooperatively together to ensure that campaign and related data requirements are clearly defined and understood by all. It is particularly important at this stage to ensure that the schema design will satisfy future campaign and analytical needs. During prototype development and testing, the user and technical teams must again work closely to ensure that the requirements are being met effectively at both the data and functional levels. The specific nature of the final solution will be somewhat amorphous until testing and learning have occurred. The project team must ensure that the business group's expectations are managed throughout the development process to ensure that all are on the same page and fully aware of the progress and challenges being addressed.

Success in Campaign Management also requires iterative learning. This collaborative effort is not defined by a one-time event, such as a cross-functional planning session, but rather requires an ongoing process. The development process will tend to be evolutionary versus the more traditional delivery model, implying a long-term relationship between the two groups. Patience will go a long way toward helping these groups move the process forward. This ongoing program will need to address new campaigns conceived for changing business conditions and opportunities. New campaigns will, in turn, require new and different customer data. Finally, as experience is gained with these new tools and processes, further opportunities and challenges will be identified, opening the door to a process of continuous improvement in campaign development and execution. Campaign Management automation should be viewed as an ongoing program and not "just another implementation project" with predefined start and end dates.

The penalty of non-collaboration is dire. The absence of effective participation and teamwork will manifest itself through extensive delays, heated disagreements, and surprises late in the development lifecycle. These conditions may ultimately result in failure of the program and the complete write-off of the investment to date. On the other hand, a real and effective partnership of the various groups involved will lead to a significant improvement in an organization's Campaign Management capabilities.

Collaboration cannot be assumed. Executives often think that once an organizational partnership is arranged, things will work themselves out naturally. This is both naïve and dangerous. How is an effective partnership of disparate groups developed and supported within an organization? The methods are not new, but they bear repeating, as the message is so often overlooked in today's business environment. Collaboration requires, first and foremost, executive alignment, commitment, and ongoing support to the development initiative. This requires *sustained* attention, leadership, and continuous planning. With sustained executive leadership in place, a clear vision and an achievable goal can be established and maintained for the delivery team. The executive can also ensure that resources maintain focus and dedication to the task, that communications are clear, and that working relationships across the team are positive. Plan periodic, team-building social events to celebrate the partnership's successes. These further enhance the working relationships across the team. Finally, executive commitment and support can help to ensure that the personal objectives and incentive schemes of the development team are properly articulated and aligned to achieve success.

The alignment and commitment of the business and technical executive teams provides the foundation for organizational collaboration, and is an absolute prerequisite to success.

Case Study: A Tale of Two Telcos, part 2

Collaboration among the stakeholders was a critical factor impacting success in both implementations as the adoption of new Campaign Management processes, technologies, and standards raised issues around organizational politics.

In the case of Firm A, collaboration was impeded because the primary sponsor — the Marketing business unit — decided that a new campaign solution was required and, furthermore, which solution would be implemented. The IT group felt it was better positioned to make technology-related decisions and was not supportive of Marketing's initiative. As a result of this lack of alignment at the executive level, there was a persistent divide between the working resources from each area resulting in less than ideal progress and success.

In the case of Firm B, IT was the implementation sponsor. The prevailing attitude of "IT knows best" served to distance the Marketing business unit. In effect, IT discounted the knowledge and experience gained by Marketing with their current processes and methods. This gap was further widened by Marketing resources that were distrustful of IT and their delivery record. In retrospect, more could have been achieved in shorter timeframes in both cases by explicitly addressing teamwork issues more aggressively and effectively at the executive level, early in the development cycle.

As a sponsoring executive, address team-building early and effectively through clear and repeated communication of your vision for Campaign Management and your expectations of the development team. Ensure that participating executives are all on the same page regarding the need for collaboration, and invest in some team-building social events before battle lines become solidified. Recognize that IT and Marketing have differing perspectives, and create a culture of acceptance, understanding, and cross-functional support.

Change Management

The introduction of Campaign Management drives organizational change. Stress points for Campaign Management adoption include:

- New technology introduction
- New responsibilities and roles
- Altered or new business processes
- New operational metrics or measurements
- Modified accountability

Insufficient attention to the impacts of these changes on the human resources of the organization will result in a Campaign Management implementation that becomes stalled in its delivery, fails to meet expected benefits, or simply fails completely with literally no adoption within the organization. At a minimum, the investment required will be much larger than originally expected. Potentially, the entire investment may be written off.

Managing Complex Change

Managing complex change requires attention to the elements shown in the following matrix. Omitting any one of these elements can easily derail implementation.

Vision	Skills	Incentives	Resources	Action Plan	**Change**
	Skills	Incentives	Resources	Action Plan	**Confusion**
Vision		Incentives	Resources	Action Plan	**Anxiety**
Vision	Skills		Resources	Action Plan	**Gradual Change**
Vision	Skills	Incentives		Action Plan	**Frustration**
Vision	Skills	Incentives	Resources		**False Starts**

Common Campaign Management Issues

The following section identifies examples of specific Campaign Management issues that arise for each of the elements in the above matrix.

VISION

Often, there can be confusion across organizational components within Marketing as to who owns or manages the customer relationship. Typically, there is no overall strategy or set of operating guidelines that dictate how and when the customer base is to be contacted and in what ways the customer relationship is to be managed. Existing Campaign Management initiatives operating out of several organizational silos are often uncoordinated, with each silo campaigning to the customer base. Mixed messages serve to confuse the customer and detract from the impact of the message. This lack of coordination can make the customer "campaign weary"; alternatively, entire portions of the customer base may get inadvertently ignored. This issue, faced by many organizations, is brought into sharp relief when Campaign Management governance is considered.

As part of the Campaign Management Vision, the executive sponsors should communicate that Campaign Management is strategic: It is tied to the organization's desire to establish a robust, coordinated, and sustained business relationship with its customers. This requires the capacity to anticipate and adapt to environmental change, such as improved Campaign Management processes and tools, in order to maintain competitive advantage. The resolution as to who *owns* the customer can often be replaced by how the organization effectively serves the customer. A clear statement of Vision will encourage organizational components to work more closely together to achieve corporate goals, rather than individual departmental ones. This translates to the ability to interact more meaningfully with the customer and to create and deliver offers and messages that directly target the preferences and biases of the organization's target client community.

SKILLS

Existing Campaign Management processes, tools, techniques, and staff abilities have likely been optimized over a lengthy period of time. It is very important to recognize the political, emotional, technical, experiential, and skill investment in the status quo. This investment manifests itself as resistance to change and adoption, at the individual and organizational levels, when new Campaign Management technologies, processes, and skills are introduced into the fabric of the organization.

Overcoming the political, emotional, technical, and skill investment in the existing processes and tools requires an attention to skills of the people involved in these current processes and tools. Identification of current skill levels and upgrade requirements and the development and implementation of the appropriate orientation and retraining are a must, so that these individuals will not feel threatened by the new Campaign Management technologies and processes.

INCENTIVES

There is dependence by Marketing departments on IT to provide the Campaign Management data needed to make decisions and define the customer lists to which the campaign materials will be sent. In this scenario, IT has considerable power over Marketing, which can be forfeited when newer end user-empowering Campaign Management solutions are put into place. Current incentives often support the two conflicting perspectives: that IT is perceived by Marketing as being “unresponsive” regarding the availability of data while Marketing is sometimes seen as being “irresponsible” when it comes to the use of the data.

The different organizational components of the business group may also have different goals supported by conflicting incentives schemes. The cooperation of the various business groups in support of the new, shared Vision will be enhanced through aligned, mutually supportive incentive systems for all groups involved based on achieving real benefits for the organization as a whole. This cooperation will, in turn, lead to improved results achieved more quickly than would otherwise be the case.

RESOURCES

The participation of a number of resources from many different areas of the organization will be required to achieve timely delivery of an effective Campaign Management solution. On the business side, individuals who are familiar with the markets and current campaigns, with the current processes of campaign development, and with the availability and use of data in support of current campaigns, will be required. Typically, various departments that create and execute campaigns will also need to be involved. A primary business point of contact will be required to coordinate and resolve the conflicting opinions of the business participants, to establish and manage the definition of requirements and resolution of related issues, and to validate the evolving solution through design, development, and testing prior to implementation.

On the technical side, there are also many types of resources required, including:

- Data architects to develop the schema and data design
- ETL developers to bring the data into the Campaign Management solution
- Database administrators to set up the databases and tables required
- Application developers to ensure that the application is configured for the uses required
- Infrastructure resources to provide the database space and processing resources
- Package Subject Matter Experts (SMEs) who are familiar with how the product can be leveraged for best advantage

Again, the technical team needs to be led by a primary technical point of contact, experienced with Campaign Management solutions.

It is important to ensure that all required resources are available at the appropriate times required to effectively support the Campaign Management initiative. Failure to do so will result in high levels of frustration for all involved.

ACTION PLAN

It is almost always the case that newer technologies that form part of the Campaign Management solution are incompatible with the existing ones. The same is true for existing processes. These new processes and technologies aim at replacing the existing "handcrafted" campaigns, with a campaign creation methodology that is faster and more structured, akin to a "factory model" of campaign creation versus the "job shop model."

In developing action plans to support the Campaign Management initiative, it is important to consider not only the plan to deliver the solution, but also the plan to migrate from the current solution to the new one at both the technology and process levels. Finally, a plan needs to be crafted and endorsed for sustaining the new processes and tools at high levels of effectiveness.

There are many more change-related issues. However, the ones we've touched on characterize our experience in the implementation and rollout of Campaign Management solutions. It is the role of Change Management, as part of the overall Campaign Management implementation, to proactively address all of these important issues. These issues often become highly politicized. As a result, strong leadership and program/project sponsorship are essential.

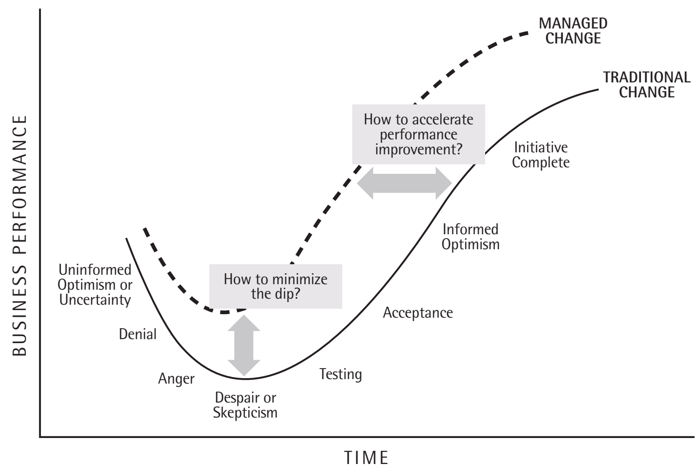
The Change Lifecycle

As seen in the diagram on page 10, the goal of Change Management is to minimize the initial decrease in business performance, as indicated by the "valley," spanned by the two-way arrow above *Despair or Skepticism*, and to accelerate the performance improvement as quickly as possible, as indicated by the gap highlighted by the two-way arrow above *Testing, Acceptance,* and *Informed Optimism*.

Typically, executives and business leaders move more rapidly through these change lifecycle phases than the more junior members of the organization. It is important to recognize this phenomenon and react accordingly. For more information on Change Management, please see the white paper *Executing on Change: Driving CRM Success Through Employee Adoption*, available for download at www.eLoyalty.com.

The purpose of Change Management here is to help the organization through the Campaign Management implementation by moderating the negative aspects of the process and promoting the positive ones. It is quite natural for most implementations to begin with high hopes, get bogged down in the project's challenges, and then emerge wiser and more competent for the effort.

Our experience is that Campaign Management implementations are more successful when the impacts on the organization's people and processes are proactively recognized and addressed. Successful leadership teams appreciate the need for coordinated Change Management. Neglecting Change Management will not necessarily lead to implementation failure, but it virtually guarantees delays in rollout, higher overall costs, reduced organizational effectiveness, and delays in adoption.



Case Study: A Tale of Two Telcos, part 3

The approach to **Change Management** taken by the two companies was very different.

Firm A staffed and supported a Change Management project role, which took on responsibility for outbound communications. This group also developed implementation-specific training materials, created an internal Web site to broadcast project progress, developed roadmaps for role changes, and built operational frameworks for a revised Campaign Management function. This team often worked directly with the senior CRM team, with considerable success.

Firm B did not address Change Management explicitly, depending instead on the existing project management process to define the structure for change. Much of the Change Management responsibility, therefore, was left to the Project Manager working in conjunction with a project's Steering Committee. This was a lighter-weight, less-expensive alternative.

The approach tendered by Firm A was more successful in terms of establishing a common Vision and related incentive elements of the Change Management Matrix. This helped mitigate the internal politics and resistance to technology and process adoption. Firm B's lower-key approach did not fare as well — resistance to the new Campaign Management solution continued well into the post-implementation phase.

As a sponsoring executive, address Change Management as a separate project entity with its own specific deliverables integrated with the overall project plan. Also, ensure that an effective Steering Committee is set up for the project with the authority to resolve issues and make project-related decisions. Resist the temptation to treat Campaign Management implementations as "just another technology effort."

Data Quality

Data quality is paramount — campaign effectiveness is critically dependent on the timely availability of high-quality data put into the hands of campaign designers who understand the data and how it should be used. Inaccurate and low-quality data costs U.S. businesses an estimated $611 Billion each year, according to the Data Warehousing Institute. With Campaign Management initiatives, low-quality data can waste money through incorrect delivery, resulting in wasted postage and materials costs or offers that don't match the customer's requirements.

However, with Campaign Management, poor quality can mean much more: The most critical outcome of poor quality data is the possibility of increased churn and loss of revenue – the exact opposite of what should be expected with the implementation of Campaign Management. Customers can, and will, be offended if they receive offers or information that is clearly wrong for them. They will lose confidence in the company sending out such incorrect material. While this event in and of itself may not be sufficient to cause customers to switch to a competitor, it will plant the seeds of doubt and discontent. With Campaign Management, these effects of bad data can be felt by hundreds of thousands of customers in a single campaign. As a result, this outcome must be avoided at all costs.

The quality of the data is a manageable entity, and organizations can plan for and deliver high-quality data, given the right approach. How does an organization achieve a high level of quality for their customer data? We've observed the following best practices:

- Plan to invest in improving data quality
- Secure the right resources
- Agree on standards
- Clearly define the requirements
- Identify the most appropriate data sources
- Develop a reasonable plan
- Build production prototypes
- Test the data
- Address data quality early

Plan to Invest in Improving Data Quality

Step #1 in dealing with data quality and latency is to recognize that no matter what level of effort has been invested by the enterprise to date to provide quality and timely customer data, there can be major differences of opinion and perspective across the development team. The resolution of these differences of opinion and fact will consume the vast majority of the development effort involved in delivering a Campaign Management solution, far beyond the effort required to actually provide the application and data.

Secure the Right Resources

The second requirement is to ensure that the development team is staffed with the best available business and technical data experts. Remember that a one-percent error rate can mean literally hundreds of thousands of real or potential customers forming negative impressions of the company from receiving inaccurate materials. It is essential that the experts be available from both the business and technical environments, and that they be able to work closely together to identify and work through these unavoidable differences in perspectives. If these experts are not available, the team is simply not ready to proceed.

Agree on Standards

The next challenge facing the development team is to establish agreement on reasonable guidelines regarding accuracy and timeliness. Will a one-percent error rate be acceptable or will certain types of data require more or less accuracy? In terms of the timeliness of the data, can the business afford to use data that is one hour, day, week, or month old at the time of creation of the campaign list or output file? How do the requirements for up-to-date information vary across the data elements involved and across the various types of campaigns?

Clearly Define the Requirements

Another essential ingredient is a very specific definition of the data elements required as campaign drivers and output fields, and how these elements will be used within specific campaigns. This requirement definition process will only be possible if at least some of the members of the development team have prior experience in working with the data elements, and knowledge of the meaning of the data elements and the variations of the data values involved. The availability of a reference data system will assist significantly in establishing at least some parameters for quality and timeliness of data, although inevitably the question will arise as to which is the more accurate. It is also important to keep in mind the very large quantities of data generally involved in Campaign Management solutions. The more data required, the more processing time and hardware resources required to load and update the data.

Identify the Most Appropriate Data Sources

Often there will be alternatives for sourcing the data required for a Campaign Management application, including data warehouses, data marts, and operational data stores. An analysis of the various sources is required to determine or validate the accuracy of the data involved, the inherent latency of the data from particular sources, and the transformation and cleansing processes that are involved with loading data into the various sources. Finally, the uses and users of the data need to be considered. If the data is required by many business users, and not just Campaign Management, the data should be staged in the data warehouse or a data mart.

Develop a Reasonable Plan

Recognize the challenges in delivering high-quality data by ensuring that a comprehensive and complete integration test plan is in place, prior to delivery to the business unit for user acceptance. Ensure that the plan provides sufficient time and resources to assess, correct, redeliver, and test fixes to data quality issues. It will be necessary to start with a sample of the data, simply because of the volumes of data involved. However, it will also be important to load and test production data. The initial loading of the production data itself can take many days, and even weeks, to complete since the initial loads will not likely be optimized for best performance.

Build Production Prototypes

The approach of quickly developing a production prototype for a small number of very straightforward campaigns will help the entire development team get up to speed on the new processes and the application, and will highlight the changes and corrections required to deliver a first-rate solution at a reasonable cost.

Test the Data

In addition to technical testing of the data, ensure the plan provides for user acceptance of the data. This will require:

- Knowledgeable business users who understand what the data means in business terms and how it should be used;
- The technical team sharing data knowledge in order to achieve the clearest possible definition of the data elements required and how they will be used in the campaign;
- Development of clearly defined acceptance criteria regarding the accuracy and timeliness of the data;
- Sufficient analysis of the available data to ensure that the sourcing is appropriate for the different types of data required; and
- An agreed-upon test plan that provides for complete evaluation of the data elements and several cycles for evaluation, correction, and retesting.

Address Data Quality Early

It is vitally important to address these questions early in the development cycle of the Campaign Management initiative. Without adequate definition and agreement around error rates and latency by type of data element, the development team will waste significant time focusing on unnecessary accuracy and updates. Conversely, spending insufficient effort on these questions will result in poorly targeted campaigns and low take rates.

Case Study: A Tale of Two Telcos, part 4

As with most CRM-related efforts, **Data Quality** played a pivotal role in the Campaign Management implementations. Both telcos pulled their data principally from a Data Warehouse, and it was assumed that this data resource was essentially fit for Campaign Management use.

Firm A assumed that the data sources were clean and essentially free from error. For the most part this was true; however, during the final rollout period data issues cropped up. These issues detracted the organization from the overall technology and process adoption. These data quality issues remain to this day as a general concern.

Firm B took an aggressive stance on the quality of data and its fitness for this purpose. This "delayed" the project for almost three months. During this time a number of issues related to the data source were discovered and resolved, with the appropriate data quality standards established. The Campaign Management implementation put much of the data under microscope — not only did the Campaign Management team benefit, so did the rest of the organization.

Do not assume that the data sources that will be used for Campaign Management will have "clean data." Assess, in detail, the quality of all the data sources that will be used and complete this assessment early in the project. This assessment should include data latency, data volumes, data currency, and data accuracy. Make the responsibility for assessing the data quality a shared one between IT and Marketing.

Developing Experience

The introduction of a Campaign Management solution in an organization involves the implementation of a new process across many component groups of the Marketing and IT organizations. As with the implementation of any new, somewhat complex process, the risks are high that different parts of the organization will progress at different rates. Keep in mind, however, that Campaign Management is a process that must be adopted — it cannot be simply turned on for use, as is the case with a desktop or self-service application. In fact, it is possible for a single group to jeopardize the entire implementation, and the associated investment to date, by dragging its heels during the migration to production phase. The benefits expected with this new process will only be achieved when all parts of the organization are working effectively together to achieve the common goal.

The transition from process and tool implementation to actual campaign production is a delicate matter. It is at this time that the Campaign Management solution is most vulnerable to critique, as the technology and processes remain unproven. During this transition, there is the need for the users to develop confidence that the Campaign Management solution will meet or surpass their needs and expectations. This confidence is gained through the experience of working with the tool, the data, and the other organizational components involved. Successful Campaign Management implementations include explicit provisioning and planning for the development of experience early in the implementation-to-production cycle.

Start Simple

Successfully developing Campaign Management experience requires that staff begin creating and developing campaigns that are relatively small, “safe,” and mainstream. By avoiding the selection of initial campaigns that are excessively time-critical or resource-intensive, staff can focus on correctness, completeness, process adoption, and process fine-tuning. The results from these smaller, simpler campaigns are easier to validate and are lower risk than the larger, broader, and more ambitious campaigns down the road.

Also, *if you slip, don’t fall* — do not put the team in the position where the failure to develop or execute an initial campaign leads to the dismissal of the entire campaign development process and Campaign Management technology.

Develop Campaigns in Parallel

One way to help with the adoption and learning process is to create campaigns using both the “old” method as well as the “new” method. In this approach, organizations develop a campaign with each method in parallel, and validate the results of the new technology against the old. Campaign requirements should be similar to result in a meaningful comparison.

This is a great time to “shake down” the new operational processes and train staff. This parallel campaign development reduces risk. One interesting consequence of this approach that we have encountered is that we have seen that the “old” methods of campaign creation were, in fact, flawed. This result can often be used to encourage skeptics that the adoption of the new technology and processes is worthwhile.

Encourage Adoption Explicitly

Delayed technology and process adoption will delay the development of experience. People adapt to changes brought on by new technologies and processes at different rates, and this has a direct bearing on their ability to gain experience. There is a natural tendency in all business-related change to go through a stage of skepticism or uncertainty that serves to retard technology and process adoption, as depicted in the Change Lifecycle graph on page 10. Getting past this phase is essential. A major focus of the Change Management effort is to propel organizations as swiftly through the "valley" as possible so that experience can be gained with as little expense of effort and time as possible. As mentioned in the Change Lifecycle discussion, business leaders and executives move more rapidly through the change lifecycle phases than the more junior members of the organization. It is important that these executives keep this in mind and avoid the temptation to assume that the rest of the business will match their own pace of adoption, thereby overestimating the speed at which Experience Development will begin.

Reward Experience Gained

It should be expected that mistakes will be made in developing an effective Campaign Management solution. Some data may be sourced incorrectly, some elements of data or functionality required may have been missed, or the quality assurance process may have missed some data accuracy issues.

Viewing the implementation of Campaign Management as the beginning of an ongoing program, rather than as a project with strict deadlines and deliverables, will reduce stress levels for the participants involved and will likely result in more timely and effective implementation than would otherwise be the case. Recognize and reward learning based on initial trial implementations. This will help ensure that "lessons learned" are reinvested in the program as soon as possible.

Recognizing the value of early experience gained in implementing a new Campaign Management process, and planning to achieve accordingly, will result in a more timely and effective implementation, resulting in improved ROI.

Case Study: A Tale of Two Telcos, part 5

Both firms **Developed Experience** with the new Campaign Management technology by executing parallel campaigns and confirming the results before they were used.

Firm A had the advantage of a tailored training plan that provided Campaign Management staffers a chance to "test drive" the application before attempting to use it in production. Experience with the application was developing even before the application went live.

Firm B did not go through the same sort of training regime, and the major portion of developed experience occurred when campaigns were developed in parallel. Firm B also began with tried-and-true contract renewal campaigns – ones that could be easily verified through parallel testing and that could be executed several months in advance of their deadline. Some initial exposure to the Campaign Management application took place in a production-sized environment – this proved to be a huge confidence-builder in the eyes of the end users.

With Campaign Management implementations, start simple. Do not begin with complex, mission-critical campaigns. When building systems for training or production preparation, create as large a Campaign Management data store as possible. Finally, be aware of possible resistance to technology and process adoption, as this will impede the rate at which the organization develops confidence in the new Campaign Management functionality.

Operational Accountability

Operational accountability is the bedrock upon which the Campaign Management implementation is built. Without a credible implementation plan that includes specific Campaign Management roles and responsibilities, the entire effort can lose focus and become stalled or derailed. Remember that the implementation of Campaign Management is the implementation of an ongoing process, more than a technology or tool, that should be considered as a program rather than as a project. As a result, the job does not end with implementation, it only begins.

Plan for Evolution and Support

The implementation of a Campaign Management solution represents the implementation of a process that will continue to grow, evolve, and mature within the organization. This, in turn, will require the active and committed support of many different groups on an ongoing basis. Early implementation of initial, basic campaigns will support the development of the required support groups and their associated roles and processes.

The alignment of the various support functions within the business and technical divisions may vary considerably from one organization to another, depending on a number of factors, such as the traditional division of duties and responsibilities within the organization and the commitment and support of the various IT and business executives involved.

Campaign Management Roles

The following table outlines some of the required support groups, their roles, and their alignment with the business and technical communities.

Group	Role	Alignment
End users	Those who will design and create the campaigns.	Within the business community.
Trainers or coaches	Provide end-user training on the use of the application and the underlying data.	Within the business community. The training function is sometimes provided by the power users or the application administrators.
Power users	Expert users of the application who are highly knowledgeable with respect to the underlying data. Often specify requirements for fixes and changes on behalf of the business community. Often complete user acceptance testing on behalf of the business community.	Within the business community.
First-level support	Provides first point of contact for the business users for user questions, issues, and accessibility; coaches the business users in the use of the tool.	Can be aligned with either the technical or business community; often aligned with an existing Help Desk function. Coaching function may be provided by the trainers or power users.
Application administrators	Maintain users and user access to the application. Undertake low-risk changes to the application such as user-defined filters, materialized lists, exclusion criteria, etc.	Can be aligned with either the technical or business community.
Technical support • Developers • Data architects • DBA resources • ETL resources	Analyzes and resolves issues identified with the tool and related data. Designs, develops, and implements changes to extend the functionality, data, and campaigns supported by the tool.	Within the IT community. Ideally, dedicated resources supporting the Campaign Management application.

In addition to the groups identified on the preceding page, other groups should be considered to enhance the effectiveness of the solution rollout:

- *Launch Support Team:* Provides additional support required during the first 30 to 60 days after launch. This team often consists of the power users who have been involved in user acceptance testing.
- *Application User Group:* Periodic meetings of all users of the application can assist with the identification of issues, enhancements, and associated priorities for development. This group becomes particularly important as more business groups with differing objectives and challenges begin using the Campaign Management application.
- *Campaign Management Communications Manager:* Ensures that production issues and application enhancements are quickly and effectively communicated to the business user community. Can also facilitate the user-group meetings.

Case Study: A Tale of Two Telcos, part 6

Operational Accountability for each telco was handled very differently.

Firm A benefited significantly from the roles and responsibilities framework established by the project's Change Management team. This organization also included a Campaign Management-specific Help Desk to aid in the adoption and the inevitable end-user learning curve issues.

Firm B struggled with their operational framework and roles, and while the operation of the Campaign Management application was well-supported, the transition to the IT Operations group lagged behind.

In large part, the differences seen here between the two telcos are a direct result of having an executive-level CRM position and having staffed and supported a Change Management function on the project. In addition, Firm A's Change Management team was able to proactively address transition risks and needs, and to ensure that these were addressed as the implementation proceeded.

Address the operational requirements well before the end of the project and work these requirements into the fabric of the project at an early stage. Ensure that operational roles and responsibilities are spelled out in clear terms and included as part of the overall Change Management program. Develop a set of operational metrics that serve to manage and measure the overall Campaign Management process.

Above all, do not make the mistake of assuming that the transition from implementation to production will occur without concerted effort and attention.

Next Steps

While earlier sections of this paper have identified several critical success factors related to implementing Campaign Management solutions, this section looks at how to assess these factors within your own organization or implementation team, and thus improve the likelihood of a successful implementation.

A quick method of assessing organizational readiness is outlined below. A more detailed approach would be to undertake a thorough Risk Assessment prior to commencing a Campaign Management initiative. For a detailed methodology for completing such a risk management, please see our supplemental white paper *Managing CRM Risk*, available for download at www.eLoyalty.com.

Some Questions for Consideration

A quick assessment of the readiness of your organization to support implementation of a Campaign Management program can be completed in the table below.

Question	Yes?	No?
1. Are all of the required resources available from the business on a dedicated basis to support this initiative?		
2. Are all of the required resources available from the IT group on a dedicated basis to support this initiative?		
3. Have these groups worked effectively together in the past and was the overall effort successful?		
4. Are the participating executives aligned effectively in terms of vision, priority, expectations, commitment, and support?		
5. Is there a team-building plan in place to help these groups with disparate views work well together now and in the future?		
6. Is there project management and governance in place to ensure issues are identified and addressed quickly and effectively?		
7. Are there achievable milestones in place to demonstrate early success?		
8. Is there a commitment in place to support the ongoing nature of a program versus one-time delivery as a project?		
9. Are the goals and incentive schemes of the various participants properly aligned to support cross-functional support and success?		
10. Has the Vision been articulated and communicated to the entire project team regarding the goals of, and changes expected with, this initiative?		
11. Is there a partnership culture of acceptance, understanding, and cross-functional support in place versus attitudes of mistrust and confrontation?		
12. Does the executive recognize the change management challenges inherent in this initiative and are there resources and plans in place to manage the human aspects of the changes involved?		
13. Are there methods in place to identify early-warning signals indicating resistance to adoption?		
14. Is there a resourced skills assessment and retraining plan in place for all impacted by this initiative?		

(continued)

Question	Yes?	No?
15. Are there plans in place to address not only initial delivery of the solution, but also full migration to production and ongoing, sustained support of the new tools and processes?		
16. Does the organization really understand the critical nature of the customer data involved and the need to have or deliver high-quality data?		
17. Is the organization willing to invest in ensuring that the quality of the data is sufficient for Campaign Management purposes?		
18. Is there a clear plan in place to assess the quality, latency, and sourcing of data and to correct as required?		
19. Is there agreement on the standards to be used in assessing the quality, accuracy, and latency of data?		
20. Is there a method of collecting and understanding what data is required and how it will be used, such that all can understand the requirements involved?		
21. Is there a standard of comparison available to help assess the quality of the data involved?		
22. Is there a clear and agreed-upon strategy in place regarding the sourcing and migration of data?		
23. Does the plan provide sufficient time for testing the data separately from testing the functionality of the solution?		
24. Does the development plan provide for early development, delivery, and evaluation of a production prototype based on a relatively easy campaign?		
25. Does the plan provide for both technical and business testing of the data to ensure a high level of quality and usability?		
26. Is there an expectation of learning and refining the processes, data, and application as experience is gained early in the delivery cycle?		
27. Are all participant groups sufficiently motivated to achieve success?		
28. Does the plan provide for gaining real experience with, and fine-tuning, the data, tool, and related processes early in the development cycle?		
29. Will the first campaign to be implemented be a good candidate for early success?		
30. Are there processes in place to build and evaluate initial campaigns in parallel with current campaign development methods?		

(continued)

Question	Yes?	No?
31. Is there a culture of learning from early mistakes and reinvesting this learning quickly and effectively, versus a culture of identifying who dropped the ball and why?		
32. Is the post-implementation infrastructure clearly understood and agreed to by all participants?		
33. Will this post-implementation infrastructure support ongoing evolution, refinement, and maturation of Campaign Management within the organization?		
34. Are there operational and business metrics identified, agreed to, and in place, in order to identify success or required improvements?		
Total		

If you answered “Yes” to most of the questions above, then you are likely on the way to a successful Campaign Management program. If the number of “Yes” and “No” responses were split evenly, we recommend engaging qualified external resources to address the areas of risk and improve the chances for success. If you responded “No” to most of these questions, then you may want to consider reevaluating your Campaign Management implementation plan. A Campaign Management initiative will likely fail without considering the elements outlined above.

Conclusion

Companies that depend on effective marketing campaigns to drive revenue can realize substantial benefits from Campaign Management automation. But as illustrated throughout the real-life examples presented here, successful automation of Campaign Management processes for large enterprises requires, at a minimum, Collaboration, Change Management, Data Quality, Developing Experience, and Operational Accountability. Poorly implemented Campaign Management solutions have the potential to jeopardize an operation and even an entire business enterprise. To avoid this risk and receive the optimal return on investment from this effort, leaders must be cognizant of the risks and the best practices for overcoming the challenges, and put that knowledge to work with a sound implementation strategy and plan. This approach can help you successfully achieve your Vision.

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About eLoyalty

eLoyalty is a leading management consulting, systems integration, and managed services company focused on optimizing customer interactions. With professionals in offices throughout North America and Europe, eLoyalty's broad range of enterprise Customer Relationship Management (CRM)-related services and solutions include creating customer strategies; defining technical architectures; selecting, implementing, and integrating best-of-breed CRM software applications; and providing ongoing support for multivendor systems. The combination of eLoyalty's methodologies and technical expertise enables eLoyalty to deliver the tangible economic benefits of customer loyalty for its Global 2000 clients. For more information about eLoyalty, visit www.eloyalty.com or call 877.2ELOYAL.