

CRM Teleconference
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Hello, my name is Gilda Sebenick. I am a Managing Partner at DGCC.COM, creators of RecruitTrack Recruiting and Staffing Software. I have spent over 15 years in database marketing and software design, with an emphasis on CRM. The purpose of this teleconference is to give you a basic foundation in CRM and how to apply it to recruiting and staffing.

CRM is a popular buzz word, but many people still don't understand what it means. Don't get me wrong, they understand that CRM helps you improve your customer relationships, but when you ask them to explain how to achieve CRM, they just tell you with CRM software. The problem is, CRM is actually a much subtler concept than just improving customer relationships.

CRM stands for Customer Relationship Management. The underlying idea of CRM is to provide personalized service to each customer so that they feel like you know them as a person and not a number. CRM's goal is to use technology to get back to the days when people had personal relationships with their local merchants.

The challenge of implementing CRM in today's world is that while technology has helped us broaden our customer base and our channels of communications, it also has led to more demands on our time by an ever-increasing amount of people. Even if your customers are other departments within your organization, their increasing workloads have translated to increasing workloads for you, along with a demand for faster turnaround. So, to achieve CRM you need to make sure that you utilize technology to help you manage your interactions with your customers so that you can treat them as individuals instead of numbers. You need to be able to maintain salient details about them in a way that is easily accessible to you and anyone else who has customer data so that, whenever you interact with the customer, you can demonstrate a clear knowledge of who they are and what they need.

So how do you achieve CRM? The crux of CRM is to organize your data in a way that helps you identify your best customers so that you can: 1) give them attention so that they stay your customers; 2) identify other services they may need; 3) show them that you understand their business by telling them you have identified their needs and offering them additional services to meet those needs; and 4) increasing the amount of business you do with them by selling them the additional services. These four key tenets of CRM also apply to your tier two (your next best customers) and tier three customers (the rest of your customer base). You allocate your internal resources based on the current or potential future value of the customer to your organization.

Even if your business is recruiting candidates for other departments in your organization, you can still benefit from CRM. You may not have to worry about keeping them as clients, but you can still work at identifying their needs and offering additional services. In fact, improving your service to your clients will lead to improved hiring and retention rates, both of which benefit your entire organization.

The main tools you will need to implement CRM are: 1) Contact management software that contains all your candidate and customer data; 2) An understanding of what traits constitute a good candidate for your various customers; 3) The ability to easily identify and search on those traits in your contact database; 4) The ability to keep a history of your contact with your customers and candidates; 5) The ability to utilize that history and key traits to identify customer needs and determine solutions

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to those needs; 6) The ability to share this information with your customer and everyone in your organization who has customer contact.

First, make sure that you have all your customer and candidate data in some sort of contact management software. Any contact management software can be CRM software as long as it helps you effectively organize and use your data. But, that means you must enter in all your data and enter it in a consistent manner. Don't put phone numbers in notes field and skills in e-mail address fields. If you do that, you won't be able to effectively search your data, which means you won't be able to utilize it for CRM. If you find that you are having to force fit your data into your software, you should call your software vendor and see if they can help you identify a solution so that you won't have to try to find places for your data. If your vendor can't offer you a better solution, then it's time to look for another vendor. The short-term pain of ramping up on a new contact management software package can be easily recouped if it helps you work more effectively and improve your customer relationships and, consequently, your ability to quickly fill open jobs with good candidates.

Second, identify what traits constitute a good candidate for your customers. Some of the traits may vary based on the department and/or the position type, but you may also find a pattern of traits that are consistent no matter what the position. These will most likely be soft skills influenced by your organization culture. Go through your current employee base and use them to identify the skills that are the essential for success for each position type as well as the traits are a detriment. Once you have the traits, both good and bad, make sure you apply them to the records in your contact management database. It helps if your database allows you to define your own skill codes so that you are able to track the exact information that is relevant for your organization.

When you have identified the good and bad traits for each position type, you can proceed to the third step, making sure that you can search for candidates based on those traits. Run some test searches using your criteria to see if it turns up the results you expect. If you haven't already done so, you should enter your existing employees so that you can have them available for your test searches. After all, existing employees are potential candidates for other departments. If you notice that some key candidates are missing, you will want to go back and look at their records to see if there is missing data. If not, you may need to revise your best candidate criteria to include these people. Ideally, since these are searches you will perform frequently, you should be able to save these searches so that you can immediately identify any changes.

Fourth, as part of your contact management software, you should be able to keep a history of any contact you have had with your customers and your candidates. Whether it's a phone call they made to you or an e-mail you sent to them, that contact should be recorded. It should also be easy to organize and view. After all, if a customer calls you about something they talked to you about last week, you can't leave them waiting for too long while you look up that information. The most important contact history you can retain, though, is who they hired and who they passed on and why. And, after the hire is made, check back with the customer to see how the candidate is working out in the position. You should also check back with the candidate to see how they like the position and if it's what they expected. Make sure you use that information to identify any difference in the skills requested

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for the position verses the skills that are really used and that you note that information in your contact database.

Fifth, you need to be able to analyze your contact history and key traits and look for other patterns that can lead you to a deeper understanding of your customers and their needs. You should be able to do this via searches and list building in your contact management software. Of course, your own knowledge of your business is the most valuable tool you have for helping you interpret the information you find. Once you have done your analysis, you can then utilize it to help you better understand your customer needs so that you can come up with solutions and suggestions to meet those needs. For example, you may notice that a customer requests a certain set of skills for a position, but your analysis has discovered a slightly different set of skills are best for that position. Or you may notice that people only last 1½ years in another position before they are promoted internally or go to another company looking for more responsibility. You can now employ this knowledge to devise solutions for these issues. This leads us to the sixth step to achieve CRM, communicating your findings to your customers.

You need to tell your customers what you have discovered about their needs and why and then give them a solution based on your analysis. For example, you can tell the customer who isn't looking for the right skills, "Mary Jones and Bob Smith, two of the best people in that position, are both excellent at focusing on one task until completion. Would you like me to find someone like them?" Or for the position with a predictable turn-over rate, you can work with that department to come up with a defined career path for existing employees while at the same time looking for candidates to fill the position on a regular schedule. These are just a couple of examples; your analysis of your data will assuredly turn up many more if you have followed steps 1 - 5.

Just as important as communicating your analysis to your customer, you also need to make sure everyone in your department understands the analysis so that they also communicate the same message. Ideally, your contact management software should allow you to create tasks for your people so that you can always send them the latest messages. You should verify that your people understand how to use your contact management software and that you have clear usage policies, such as log all customer contact, enter at minimum a name and primary telephone number for all new candidates, check for new tasks every two hours at minimum (if your software can have auto-task alerts so that your people don't have to check, that's even better), etc. Remember that your people will always be the most important factor in achieving CRM throughout your organization. You can give them all the tools in the world, but if they don't know how to use them, if they don't use them consistently, or if they don't understand what messages you are trying to communicate to your customers and why, you will not be able to give your customers the services they need.

The bottom line is that if you implement CRM in your organization, you will have a better understanding of your hiring and retention needs so that you can address them. This in turn will help your organization achieve a happier, more productive workforce with high retention rates. As the competition for skilled employees continues to heat up, your organization will find itself in the enviable position of having an easier time of getting and keeping those employees than your competitors, allowing you to focus your energy on making money and increasing your bottom line.