Customer Relationship Management:
A Brief and Basic Overview

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More and more healthcare organizations are utilizing customer relationship management (CRM) tools in their work processes – especially physician tracking and consumer promotion. There are a multitude of tools available, each with different nuances that will impact how they best fit with your organization. Before embarking on a vendor search, make sure you conduct an internal assessment so your search can be well informed.

You may not be familiar with what a CRM system can do or some of the issues implementation involves, but the following will provide you with a brief overview of CRM.

What is CRM?

When we talk about tracking systems or CRM, most people think the discussion is about technology but really the important concepts around CRM are about the business process. Essentially CRM is already being done at most organizations – most likely in a non-technical basis. For example, in hospitals who consider their physicians as one set of important customers, outreach is being conducted and the results from that outreach are collected in a variety of formats – memos documenting visits, file folders with notes and information about the visits or maybe even an Excel spread sheet with a log of activities is being used.

It makes sense to harness technology to develop more efficiency and consistency in outreach efforts. There are many CRM programs available in the marketplace today. Originally the software was only used by very large companies but as technology has advanced, CRM tools have become more widely available to all organizations as a tool to support outreach efforts.

The most basic features employed in a CRM system generally include a pending system and a method of collecting data in one place so that anyone with access to the system can review collected information. For example, a physician liaison may hear about an orthopedic surgeon's frustration with block booking and the liaison will enter that concern into the database. Now, when that same physician encounters the Vice President for Business Development in another setting, the Vice President will know that this physician is frustrated. If action has been done on the issue, system users will know what has been done and by whom. On a more basic level, users can see who has been in contact with a targeted individual – physician, customer, etc. A CRM system essentially allows the organization to see and respond to the target in a unified and informed manner.

How will it help us?

Common data is collected and focused on the customer. Duplication and internal competition is limited. Efficiencies are created in the sales process in terms of identifying new targets not yet utilizing your organization's services, tracking activities with prospective and current targets/customers and reporting and summarizing actions taken or planned to be taken. Market intelligence can be gathered and utilized for planning and identifying referral changes or monitoring satisfaction with existing services.

What are the key elements we need to consider?

First, it is most important to align the department/organization's goals with the process behind the system. Why does your organization want to employ a CRM system? What does it hope to gain? Before setting out to find the right vendor, understand what your goals are for the technology. It is also a good idea to have your process outlined and in place before you try to add a technological overlay to it. Many organizations wait to have the technology define the process and end up with frustration.

Some other basic considerations you should ponder before taking the next step include the following:

- Access to the database – which departments, what users?
- What data needs to be integrated into the system?
- What types of reports will be generated from the system? For whom?
- Many systems can be customized to meet specific needs. Is there a particular level of customization desired?
- Security of data and how the data will be stored is a consideration.
- What kind of training is required? One time or on-going?
- Hosting - how will the system be hosted? Who will be the system administrator?

And similar to any new endeavor, don't plan for change in a vacuum. Make sure you have investment from your organization – both senior management and the actual users. With this investment, a good sense of your internal process and articulated goals, you will be ready to move forward.