

**PGDM , 21-23**  
**CRM**  
**DM-431**  
**Trimester – IV, End-Term Examination: September 2022**

Roll No: \_\_\_\_\_

Time allowed: 2 Hrs

Max Marks: 40

Instruction: Students are required to write Roll No on the cover page of the Answer Sheet. All other instructions on the question paper / Admit card should be followed meticulously.

| <b>Sections</b> | <b>No. of Questions to attempt</b>                                                                    | <b>Marks</b> | <b>Total Marks</b> |
|-----------------|-------------------------------------------------------------------------------------------------------|--------------|--------------------|
| A               | Minimum 4 questions with internal choices and all COs (Course Outcomes) covered in the Question Paper | 4* 5         | 20                 |
| B               | Compulsory Case Study                                                                                 | 2*10         | 20                 |
|                 |                                                                                                       |              | 40                 |

**SECTION A – (5 marks \* 4 questions) = 20 Marks**

Q1. (a). A CRM has 4 basic steps : identification, differentiation, interaction and customization. Explain each step with a practical example. (CO-1, 1.25 x 4 marks)

Or

Q1.(b) The 5 key areas of CRM are : front office(customer facing), BI , CRM rules and workflow, physical link to back office systems, performance metrics. Show and explain through a process flow diagram how the 5 key areas communicate and interact with each other. ( CO-1, 5 x 1 marks)

Q2.(a) Show through a diagram and explain as to how the following 4 fare on the number of customer interactions and interaction complexity: (i) Airlines and hospitality (ii)Telecommunications (iii) Government (iv) Transportation . (CO-2, 4 X 1.25 marks)

Or

Q2.(b) How does customer experience management result in ROI benefits. Give a 360° view. ( CO-2, 5 marks)

Q3. (a) (i) Margin: Rs 120, Retention rate: 70%, Discount rate: 10%. Calculate the CLV.

(ii) What points have to be kept in mind while calculation re CLV? (CO-3, 2 x 2.5 marks)

Or

Q3. (b) What are the advantages and disadvantages in implementation of new loyalty CRM programme (Neu) by Tata across all its consumer facing verticals? (CO-3, 2 X 2.5 marks)

Q4.(a) You have been asked to manage the alumni CRM portal for Bimtech to increase engagement and communication with the alumni. What should be your checklist to ensure that the new CRM portal meets all your requirements? (CO-4, 5 marks)

Or

Q4. (b) Sales force automation(SFA) is the next level of empowerment to the frontline sales staff, monitoring the sales staff productivity and time utilization in real time, facilitating the retailer requirement and checking the availability of stock and much more. (i) Explain using an example of an FMCG company like HUL (ii) Reasons for resistance to SFA by the frontline staff ? ( CO-4, 2 x 2.5 marks)

### **Section B( Case study: 2 questions of 10 marks each)**

#### **12 successful CRM implementation case studies to learn from**

**Amy Copadis** · April 29, 2022 ( <https://blog.close.com/crm-implementation-case-studies/>)

CRM implementation can seem like a monumental task to complete. From knowing which CRM to choose, to understanding how to fit it in with the rest of your sales stack, there's a lot involved (and a lot weighing on this working from the start).

If you're looking for CRM implementation case studies to give you ideas and confidence to get started, then look no further. We've curated these two lists just for you:

- 12 successful CRM implementation case studies to learn from
- Testimonials that highlight the benefits of CRM implementation

#### **12 successful CRM implementation case studies to learn from**

Want to get this done right (the first time)? Learn from case studies of companies who have already implemented a new CRM successfully:

## **1. How Customer.io uses automated handoffs to enable smarter sales**

**Company:** Customer.io

Customer.io is an established martech provider that needed a CRM to work better with both an inbound and outbound sales process. Plus, they needed it to fit well with their current tool stack and give them automated workflows.

This case study interview with Alex Patton, Director of Marketing & Operations at Customer.io, digs deeper into the technical setup that the company uses with their CRM and how that process maximizes the team's time and productivity.

## **2. 6 Tips for assessing your CRM + optimizing workflow—from a revenue coach**

**Company/Organization:** High Kick Sales

Kyle Stremme's consulting firm, High Kick Sales, enables sales teams to create an optimized process and tech stack. This case study digs into the insights that Kyle has learned from helping B2B and B2C companies develop their CRM system and process, plus details into how he helps managers analyze their current CRM and decide on a better system.

## **3. Implementing Customer Relationship Management (CRM) in hotel industry from an organizational culture perspective**

**Company:** Anonymous UK hotel chain

This 2016 study done by the International Journal of Contemporary Hospitality Management looked into a hotel chain in the UK as they implemented a new CRM, taking note of what worked and what didn't about their process for implementation.

They administered a questionnaire among 346 managers of a hotel chain and found that organizational culture readiness was one of the most determining factors in the success of a CRM implementation.

## **4. Choosing and implementing a CRM for small business**

**Company:** Bean Ninjas

Bean Ninjas is an accounting firm for eCommerce businesses. Their tech stack was dissonant and unconnected, and their 'CRM' (actually a project management tool) didn't even have email built-in.

Their self-written case study goes through the entire process of choosing the right CRM, implementing the system into a more optimized sales workflow, technical integrations, and the end results.

## **5. How AAXIS Digital is saving an estimated \$250,000 by switching from Salesforce to the HubSpot CRM platform**

**Company:** AAXIS

This CRM implementation case study focuses on how an enterprise company chose to migrate from one large CRM to another, saving them lots of money on a system they weren't using to the full. The case study digs into how they chose their new CRM, and what they've been able to

Trufan is a fast-growing SaaS startup with a target market that is tech-savvy. So, they needed a CRM that could move quickly alongside their team, helping them build well-constructed automations that could scale as they grew.

This CRM implementation case study shows how a wrong decision slowed their progress, and how a new solution helped them scale faster.

Wondering how Close stacks up next to today's top CRMs? Compare Close to other CRMs.

## **6. Replacing HubSpot with Close: Scaling Trufan in a CRM reps love**

**Company:** Trufan

Trufan is a fast-growing SaaS startup with a target market that is tech-savvy. So, they needed a CRM that could move quickly alongside their team, helping them build well-constructed automations that could scale as they grew.

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## **7. A successful CRM implementation project in a service company**

**Company:** Anonymous service company from Slovenia

This academic case study from 2009 by Piskar Franka and Armand Faganel from the University digs into the process a service company in Slovenia took alongside CRM consultants to help them implement a new solution.

They concluded that a proper CRM implementation can improve the relationship with customers, achieve larger information sharing between employees and lead to better strategic decisions. This is mostly interesting for historical purposes, as it gives you some insight into the complexity that were involved in implementing a CRM into a larger company in 2007.

## **8. Hownd cut CRM costs by 80% in 2 weeks—while saving SMBs during Covid**

**Company:** Hownd

Hownd works with brick-and-mortar businesses to get more foot traffic, and their mission since the start of the pandemic is to help SMBs get back on their feet and recover. They needed a CRM that would help them cut their own costs in order to help others, and that would also help them move quickly to fill the needs of their customers.

This case study/COVID success story shows how Hownd found the right CRM for their business, cut costs, and continues to help SMBs survive through hard times.

**Psst...** Curious how Close pricing compares to the value you get when using it? Use our CRM ROI calculator to see how much of a return you could get on your CRM investment.

## **9. The ultimate team effort: How the Close sales team joins forces to build more solid deals**

**Company:** Close

This unique case study is the story of our very own CRM software company and how we've implemented our own CRM into our sales stack. This case study digs into the nitty-gritty of technical setups and integrations, and how it all works together for a smooth, profitable process.

## **10. Switching to HubSpot adds up for Casio**

**Company:** Casio

This enterprise CRM implementation case study shows how consumer electronics company Casio switched from a custom-built CRM to one that was more inclusive for their marketing and sales teams. It shows how they updated their inbound marketing process and increased their sales by 26%.

## **11. The unique sales process ResQ Club uses to power their mission to zero food waste**

**Company:** ResQ Club

ResQ Club, a Finnish company on a mission to make zero food waste a reality, needed a CRM that would help them track customers and partners and scale quickly.

This case study shows how they used Close to build their own custom processes with Custom Fields, email sequences that are personalized to different European cities, and Smart Views that keep sales reps focused on the right deals.

## **12. Strategic issues in customer relationship management (CRM) implementation**

**Company:** Anonymous UK manufacturing company

This paper from 2003 by Christopher Bull from the Department of Business Information Technology at Manchester Metropolitan University Business School discusses the effects of a strategic customer relationship management process and how it affected this manufacturing company. The results of this study highlighted that CRM implementations frequently failed. It also referenced a study of 202 CRM projects which concluded that only 30.7% of organizations said the CRM implementation achieved improvements in the way they sell to and service customers.

Q1. The above 12 used cases illustrate the relevance of CRM. Why do you think that in CRM one size fits all is impossible ? The choice of CRM is based on the customer need the company is catering to. How ? (CO-4, 2 x 5 marks)

Q2. The choice of CRM from the above 12 used cases shows that the choice of the CRM is also dependent on the adaptability and flexibility provided by the CRM. Use the case to give your view point. (CO-4, 10 marks)

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