

# Chapter 5

## CRM

From the previous chapter, the implementation plan to setup the CRM project based on the guideline to gain the maximum performance in company is already approved by the management. This chapter will explain the implementation in deep detail.

### 5.1 CRM IMPLEMENTAION PLAN

From all the above mention, the companies setup the CRM implementation plan follow the frame work and guideline to implement CRM and come out with many issue that they do need to change. This issue will explain all the CRM implementation and how the company use CRM to gain the competitive advantage in the market.

In this current situation, company need to change some organization and work process to implement the CRM, this detail is already describe in chapter 4, CRM implementation plan, however, the summary about the organization and work process change is as follow.

- Changing the title for “Sales engineer” to “Industrial Advisor” who change the role from sales the product and service to the customer to be the advisor for the customer how to get the best solution for specific application to gain the maximum benefit for the customer.
- Negotiate with the service company to be the technical partner for the company to support the customer in basic equipment especially in local area of customer factory to increase the service level in term of time to react with the customer problem. However, in special equipment that need more skill and knowledge, company do need to use their own specialist to solve the problem for the customer. Finally, company had the 6 service partner to serve the customer when company request and

this company located in: 1 in north of Thailand, 1 in north-east of Thailand, 1 in south of Thailand, 2 in east of Thailand and the last one in Bangkok which is the center of Thailand. All of this service company can arrive to any customer in Thailand after any request within 6 hours which will improve the customer service level especially when compare to 48 hours as before.

- Company make the contract with the supplier in Germany to build the brand in Thailand and they give the marketing right to use their brand and promote it in Thailand. After this agreement, company got many support from the marketing department from Germany about the catalog, article, promotion material and financial support. This will help company to promote their brand together with the company name which is the most valuable asset in the future.
- Evaluate the requirement of CRM project, data requirement and setup the CRM software to record all the customer data and marketing activity in each customer to be a data warehouse and use this data as the information to launch CRM campaign to improve the existing customer loyalty and gain new customer to the company.
- Prepare the customer-centric service management project to generate the life cycle revenue for the company and customer satisfaction in the future.

After company implement the issue as the above mention, then, the company had the software to use in the computer system and all staff can input and retrieve data based on their individual authorization. However, CRM software is just software, therefore, company need to use the data in the CRM software to gain the competitive advantage in the market. In order to use the CRM more effectively, the companies need to understand the current business process and implement the CRM into the process and use as the tool to support customer more effective.

## 5.2 COMPANY REDESIGN PROCESS

From the chapter 1, the company used to provide the excellent service and professional solution for the customer in beginning how ever when the company expands the business in the last few years, company can not give the same level of service and solution to the customer as before. This problem makes huge impact to existing customer loyalty and customer service. In order to overcome this problem, company does need to improve the customer royalty, customer service and reduce the operating cost in the same time. Therefore, company decided to implement CRM in the company.

In order to do it, project team evaluated the problem and categorizes it into 2 categories which are uncontrollable problem and controllable problem. The uncontrollable problem is come from outside factor such as weather, accident, supplier, partner, and etc. The controllable problem is come from inside factor such as communication error between department, misunderstanding with customer requirement, human error in employee and etc. Every problem makes an unnecessary operating cost to the company and reduces the customer satisfaction which will impact to customer loyalty as well.

Company realizes this situation and problem in the beginning of 2003; therefore they collected the data about reason of controllable problem since the beginning of year 2003 and the result is as follow.

- Communication error 41%
- Misunderstanding with customer 28%
- Human error 21%
- Other reason 10%

In this number, if company can avoids this error, they will increase the customer satisfaction and gain the customer loyalty again. After the meeting among the project team, Company needed a system to share the information of the customer

among department to retrieve the data from one source which is more reliable and more accurate than the old system which is very simple that company use sales engineer to discuss with customer and come back to explain to the engineering department to design and offer to customer by sales administration.

The project team setups the project to redesign the business process aim to solve the problem about communication error and must understanding with customer which is 69% of the controllable problem. This project uses the knowledge of re-engineering and business redesign process as the basic of the project.

After the assessment, project teams found that the order processing process is the core function of sales and marketing department. This process involves in convert the customer order to the job order in the whole company. Therefore, if company can eliminate any problem in this process, the customer loyalty will increase in huge number. Therefore, after the redesign phase from the project team, a new process of order processing process is shown as follow using by IDEF0 method.

Figure 5.1 Business processes 1

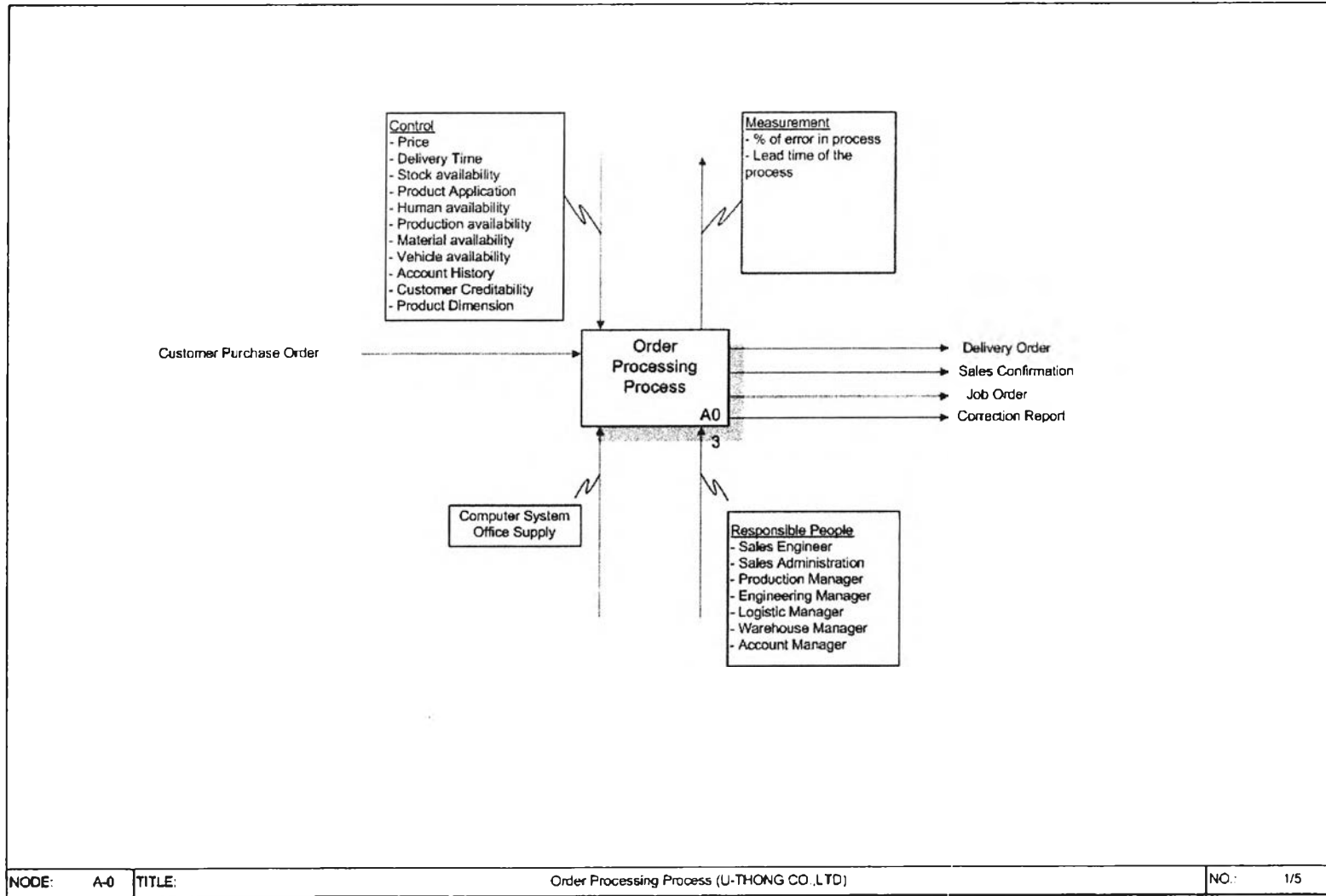


Figure 5.2 Business processes 2

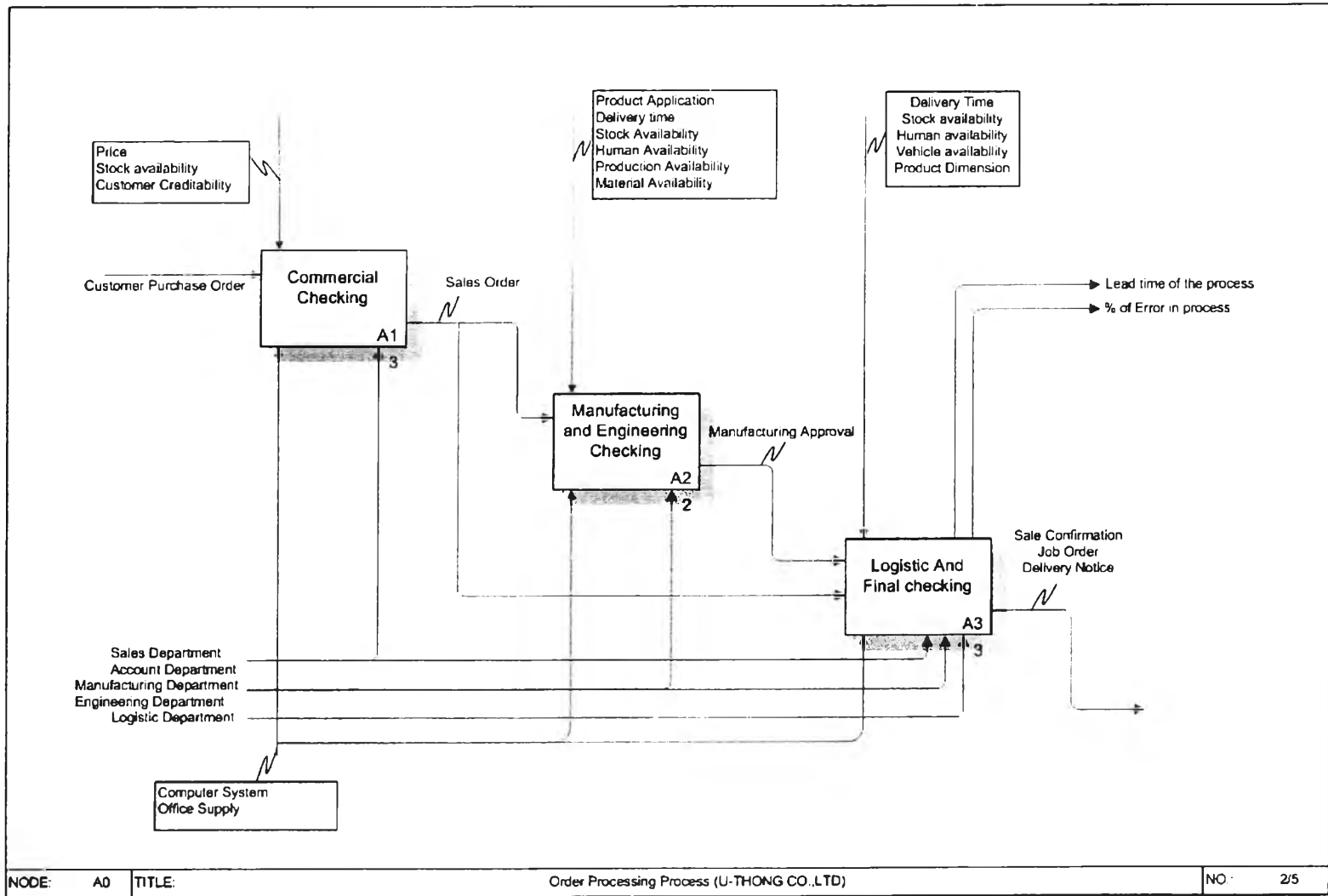


Figure 5.3 Business processes 3

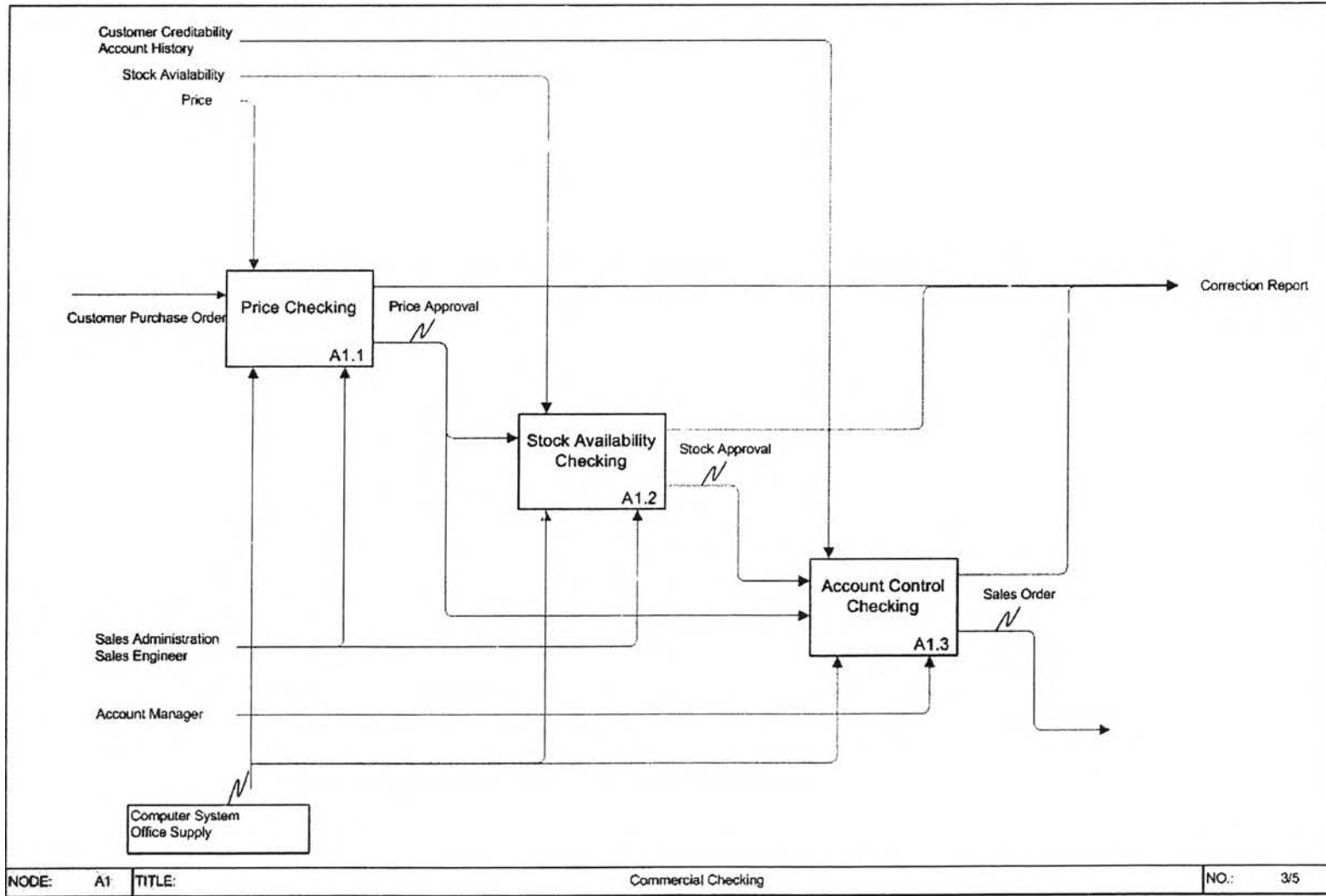


Figure 5.4 Business processes 4

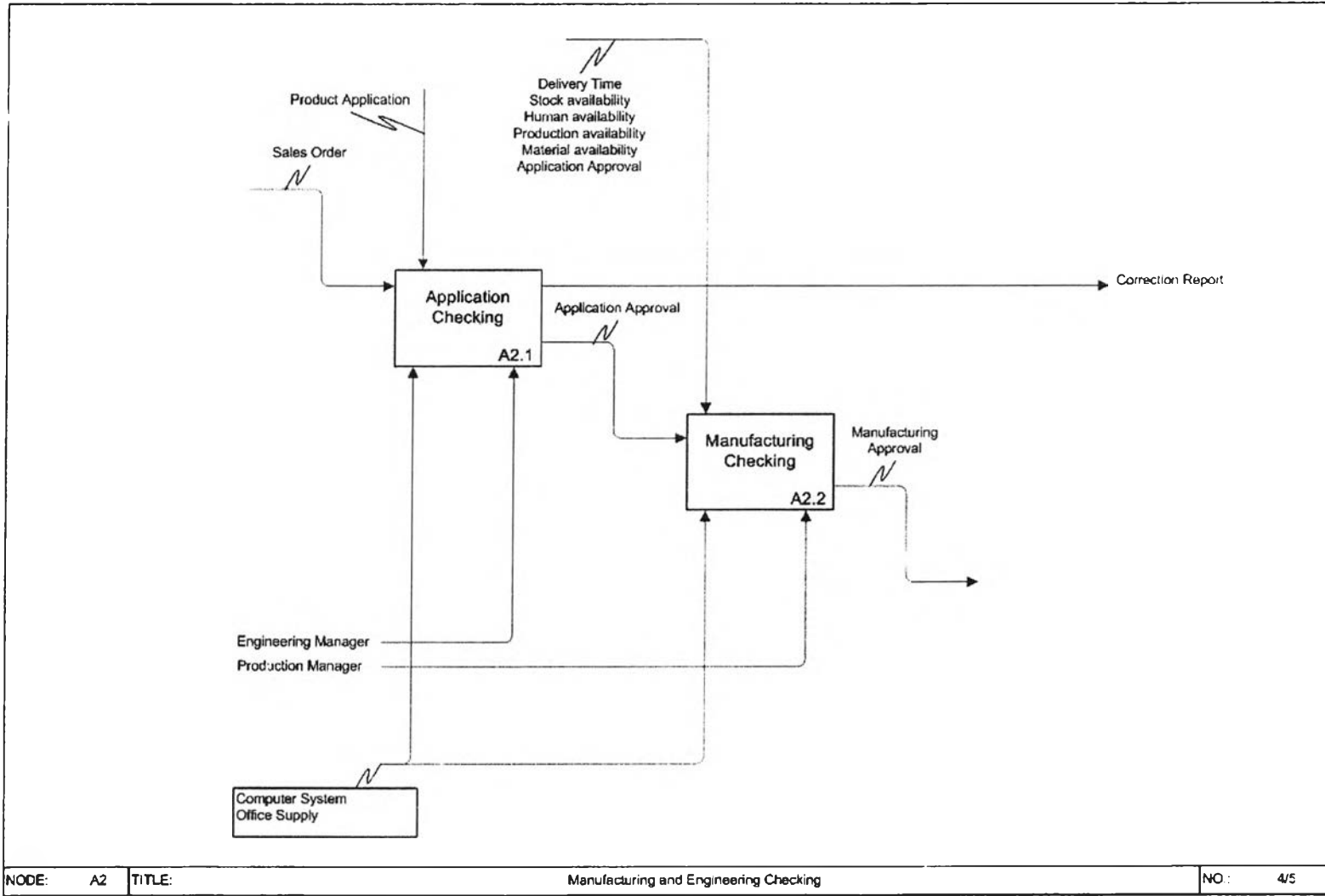
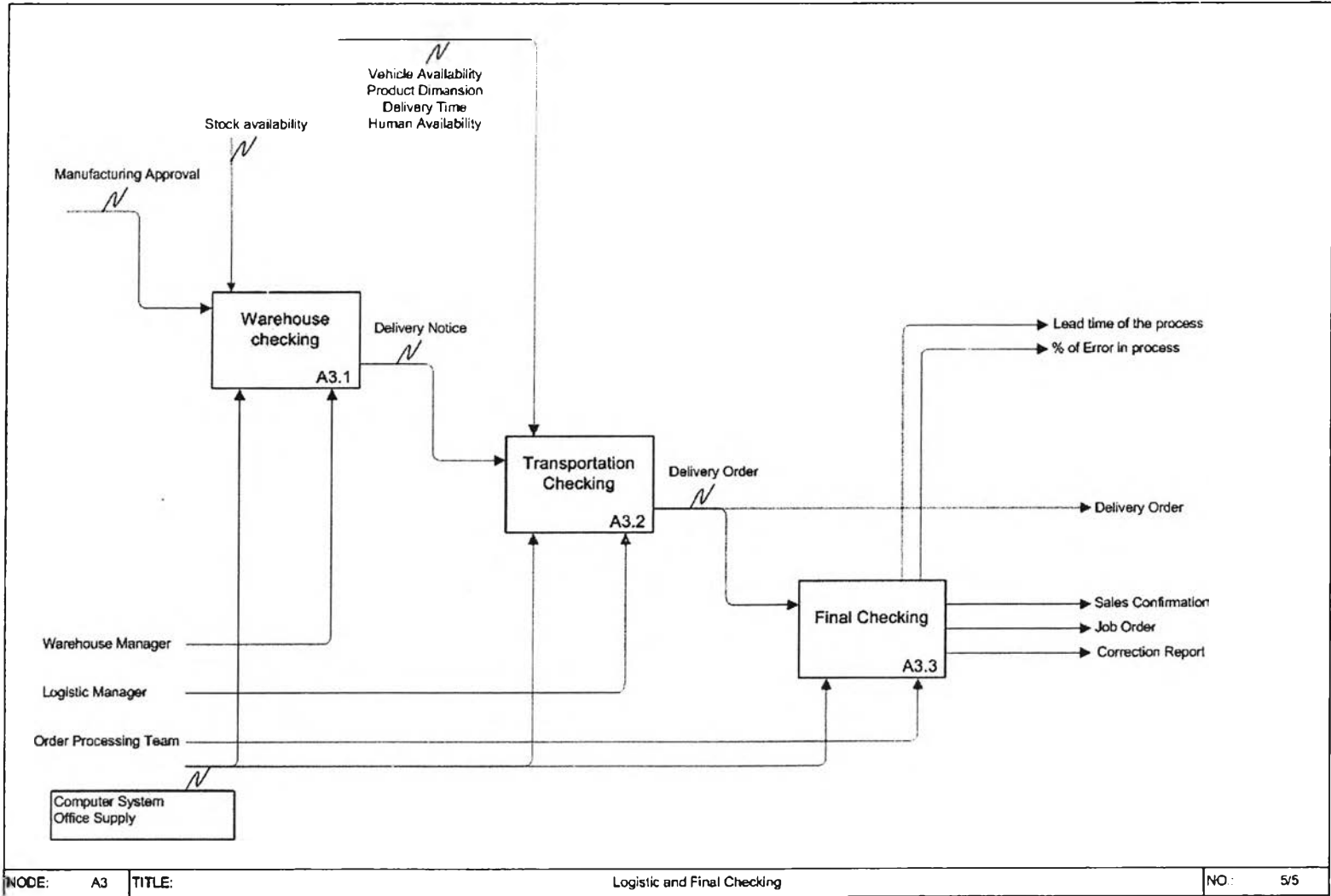




Figure 5.5 Business processes 5



The project team wants to change the system from the old simple and ineffective one to a new system which provides consistency data and monitoring system to avoid any error and reduce it as much as possible. Finally, they come out with the new business process which shown in figure 5.1,5.2,5.3,5.4 and 5.5. In this system, all employees in the company can access the information in real time to avoid the communication error in the company, to check all information from customer directly not from the conclusion of sales engineer and to check the human error during the process.

Whenever, the company can reduce the error and the controllable problem, the customer satisfaction will increase in significant number and this will improve the customer loyalty to the company. This will effect to the profitability and company business in the future. This is very important factor because it is extremely hard to get the customer confident in the business equipment. The company success to find a new customer is for expand the business in other hand to keep the existing customer is for survive in the market.

However, this process is quite complex and need a lot of process to check and monitoring. Therefore, company needs a computer system to support otherwise it will consume a lot of employee time to do this process. Therefore, the company needs to make the investment the CRM software in the company to use in this new business process.

### **5.3 CRM SOFTWARE**

The CRM software, as the previous information that company decided to assign software house to build the CRM module adding into the existing accounting software that company uses since 2001. This software will use as the core business in account department, purchase department, logistic department and sales department. Now, when add the CRM module into the software and acquire new hardware to support as the workstation for the IA to use in their department and after 1 month test by IT department and project team, all hardware and software is now ready to use.

To understand more about the CRM project in the company, the explanation of software will describe in the following. The software is build by existing software house that company used in accounting system. However, the company adds the CRM module in it. This module is design based on the above mention which will help the employee to use one database which is most updated in real time and easy to use as their task in the CRM and business process.

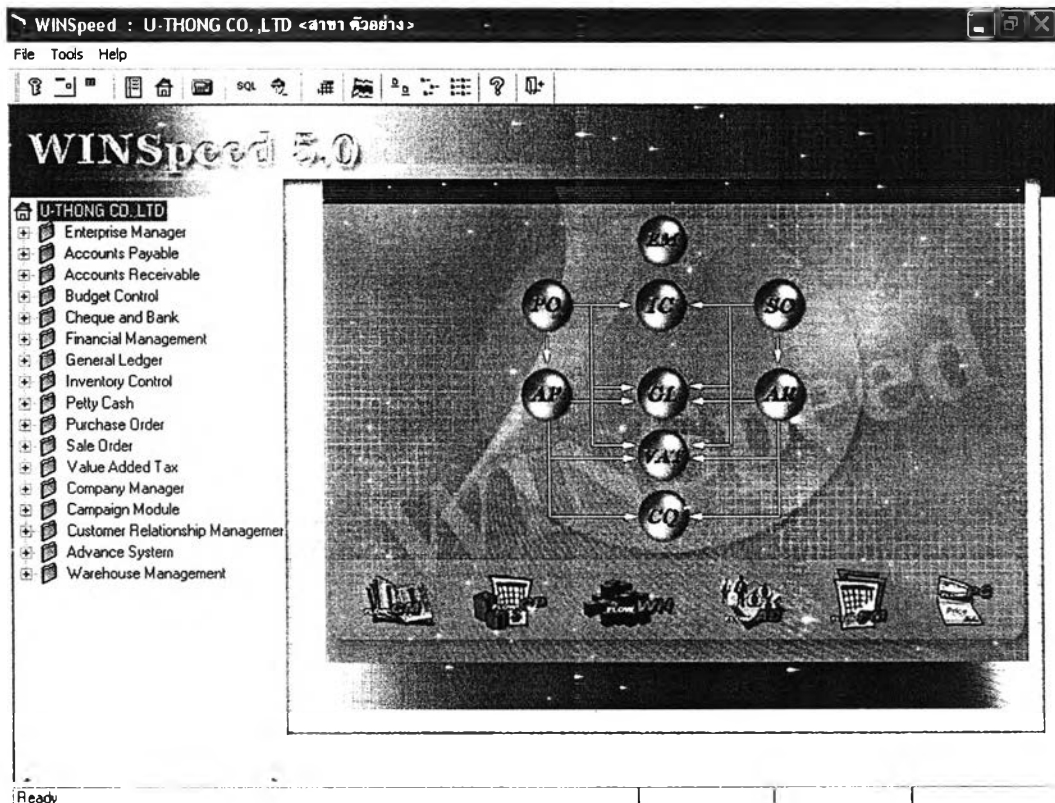


Figure 5.6 Main menu of WINSPEED

From figure 5.6, software show the main menu for user to login, in this menu all employee can only access in their specific job such as purchasing officer can access to PO system which consist of purchase order system, warehouse office can access to IC system which consist of inventory control system. All the mention systems, company have been used since 2001 except campaign module and customer relationship management module which is just install to the system.

Another change is the customer data which the old system will have only customer name, customer contact, customer address, and customer telephone and fax

number. However, from the project team requirement, new information must be acquired to use as the strategic tool for the marketing and customer relationship system.

The screenshot shows a software application window titled "กำหนดรหัสลูกค้า" (Customer Code Setting). The window title bar indicates the application is "WINSpeed : U-THONG CO., LTD <สาขา เชียงใหม่>". The form contains the following fields and options:

- รหัสลูกค้า (Customer Code): [Text Field]
- ชื่อลูกค้า (Customer Name): [Text Field]
- ชื่อลูกค้า (Eng): [Text Field]
- ชื่อลูกค้า (ลอกนัล): [Text Field]
- Short Name: [Text Field]
- ที่อยู่ (Address): [Text Field]
- ที่อยู่ (Address): [Text Field]
- แขวง/ตำบล (District/Township): [Text Field]
- จังหวัด (Province): [Text Field]
- ที่อยู่ติดต่อ (Contact Address): [Text Field]
- ที่อยู่ (Address): [Text Field]
- แขวง/ตำบล (District/Township): [Text Field]
- จังหวัด (Province): [Text Field]
- โทรศัพท์ (Telephone): [Text Field]
- E-mail: [Text Field]
- เลข/สำเนา (Number/Copy): [Text Field]
- รหัสไปรษณีย์ (Postal Code): [Text Field]
- แฟกซ์ (Fax): [Text Field]
- Homepage: [Text Field]

Additional features include checkboxes for "On Hold" and "Inactive", and a menu bar with options: Address, Detail, Credit, General, Contact/Client, Account, Sale, Shipment, Define, Description. The status bar shows "Ready".

Figure 5.7 Customer address data

The data that project team require to more in the customer data is as follow:

- Competitor for individual customer
- Customer type
- Register Capital
- Business type
- Credit limit
- Discount structure
- Condition of collecting money
- Ownership
- Decision style

- Management style
- Company revenue
- No. of staff in office and factory
- Strength
- Weakness
- Customer contact tile and responsibility
- Transportation method

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กำหนดรหัสลูกค้า

รหัสลูกค้า  ชื่อลูกค้า

วันที่เริ่มเป็นลูกค้า	<input type="text" value="15/09/2547"/>	วันเกิดลูกค้า	<input type="text" value="//"/>
ชนิดรายการลูกค้า	<input type="text" value="ลูกค้า"/>	เลขที่มัดประชาชน	<input type="text"/>
เลขประจำตัวผู้เสียภาษี	<input type="text"/>	ทุนจดทะเบียน	<input type="text" value="00"/>
เลขที่จดทะเบียน	<input type="text"/>	ชนิดประเภทลูกค้า	<input type="text" value="นิติบุคคล"/>
สาขา	<input type="text"/>		
กลุ่มลูกค้า	<input type="text"/>		
กลุ่มภาษี	<input type="text"/>	ยกเว้นภาษี	
กลุ่มวางมือ	<input type="text"/>		
ประเภทลูกค้า	<input type="text"/>		
ประเภทธุรกิจ	<input type="text"/>		
เขตการขาย	<input type="text"/>		
ช่องทางการจำหน่าย	<input type="text"/>		
รหัสสกุลเงิน	<input type="text"/>		
รหัสความสำคัญ	<input type="text"/>		
แหล่งข้อมูล	<input type="text"/>		

Address Detail Credit General Contact/Client Account Sale Shipment Define Description

New Save Delete Find Copy Preview Close

Advance System

Ready

Figure 5.8 Customer detail data

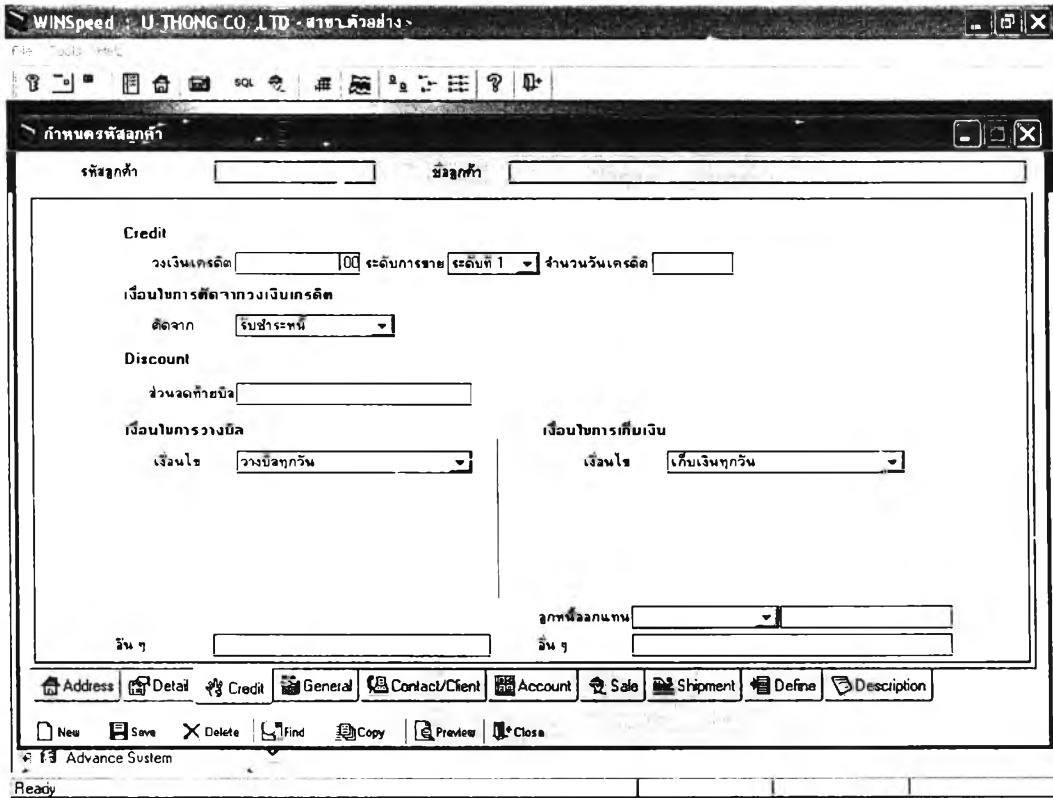


Figure 5.9 Customer credit data

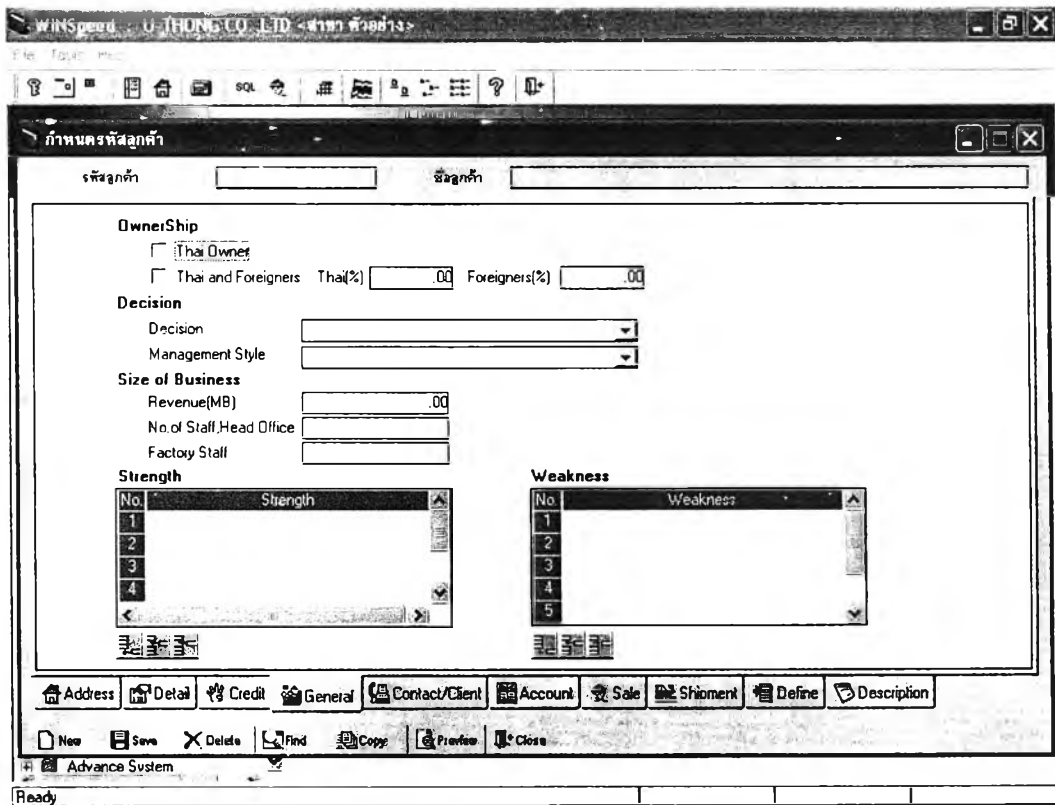


Figure 5.10 Customer general data

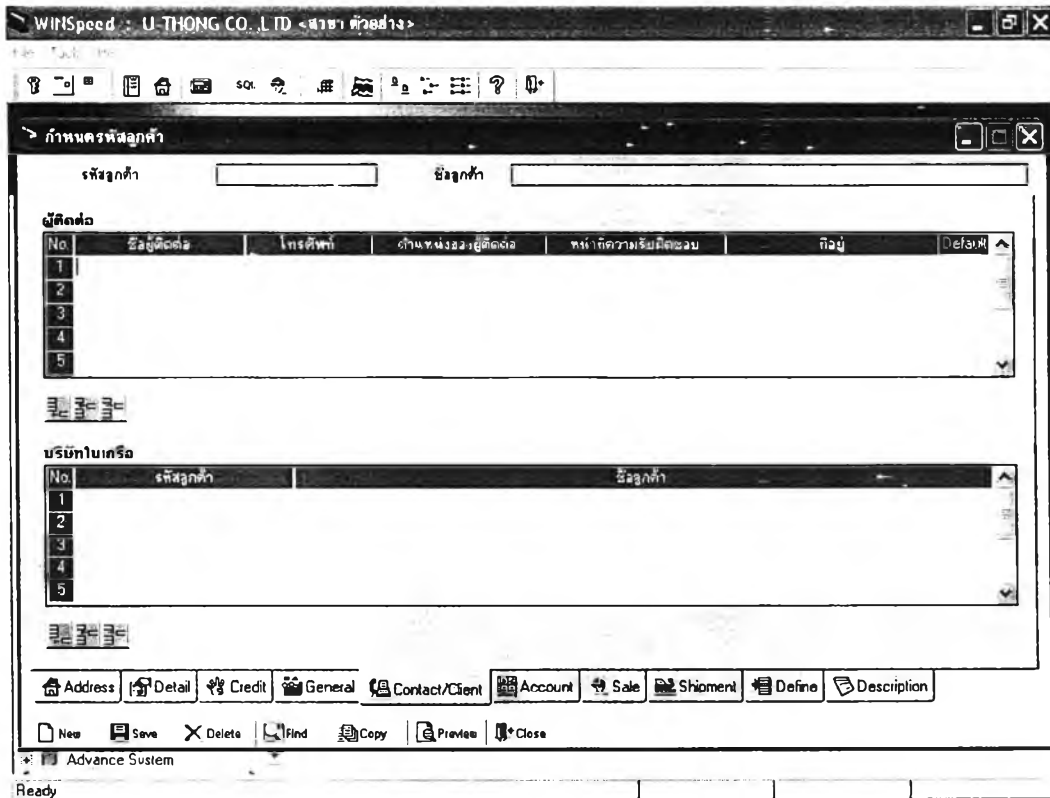


Figure 5.11 Customer contact person data

The above figure 5.8, 5.9, 5.10 and 5.11 will show some information about the data that CRM require to record in the company database based on the requirement from the CRM project team. However, if company need to add more data type into the database, company can add it from themselves in define field in the software which is more flexible and less cost than asking software house to do it for company every time. All of this data will store in the main server in the company and can be setup the security system for the authorized person only to access this database.

The responsibility person will login to the system and input the data for use in the company system. In this data do not use only the CRM team but it will use for the whole company in every department to share the information together such as account department can access to check the available information of customer for their job in accounting too.

CRM is the newest module in the system for the CRM team to use and gain the competitive advantage of the company in the future.

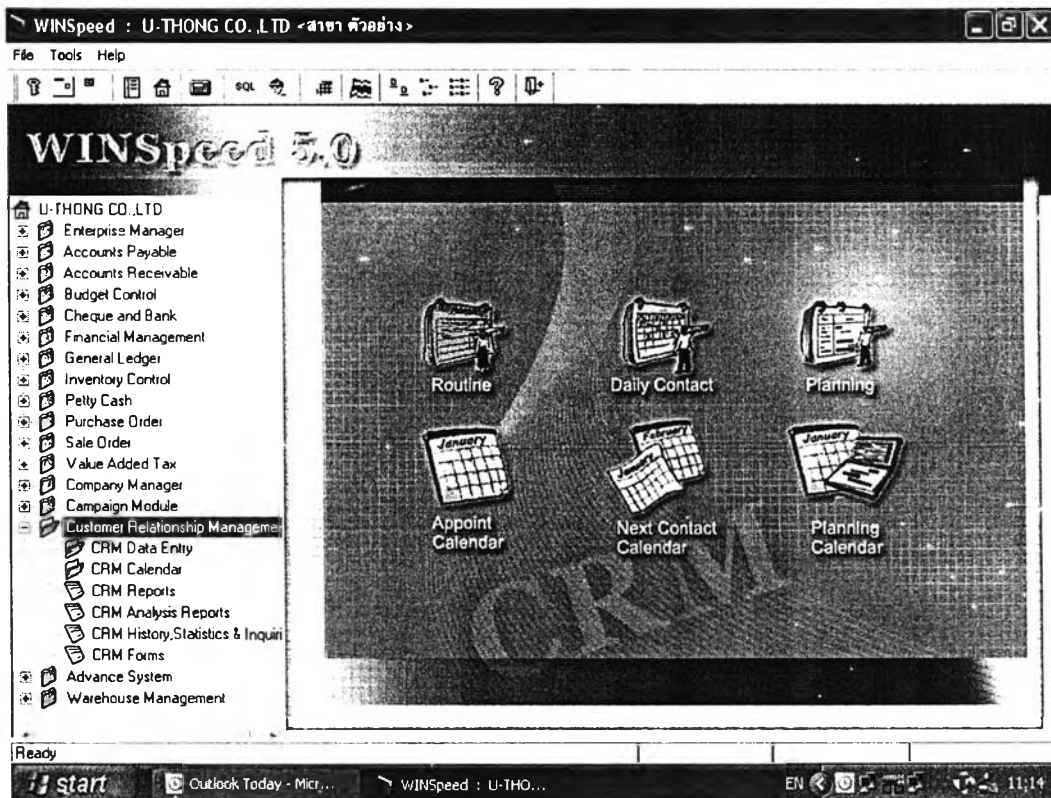


Figure 5.12 Customer relationship management modules

In figure 5.12, this module will separate into 2 main categories; the first one is the data section for the user to input the data to the system or get data from the system, second is the report section for the management level to get the report from the day to day data from the past and even some report will give the analysis of the data also.

Same as another system that company can made new report by themselves in the future in case that they need. The new report can be create by setup the form and link to the specific data table in the database or process the data in the data base and show in the report. This is a very useful in case that company will expand business or process in the company and no need to ask for software house to change it or add it for company. Nevertheless, project team assigns some basic report to build in with the system.

Data section will consist of 2 main menus which is data entry and calendar. The data entry will use as the input and query the data in/out from the system. This is



the most important information for the CRM project and this is the gold mine in the database that UT can use it to make the competitive and better service for the customer in the future. This section will consist of routine (daily entry), Contact, Planning, Customer relations and Generate customer.

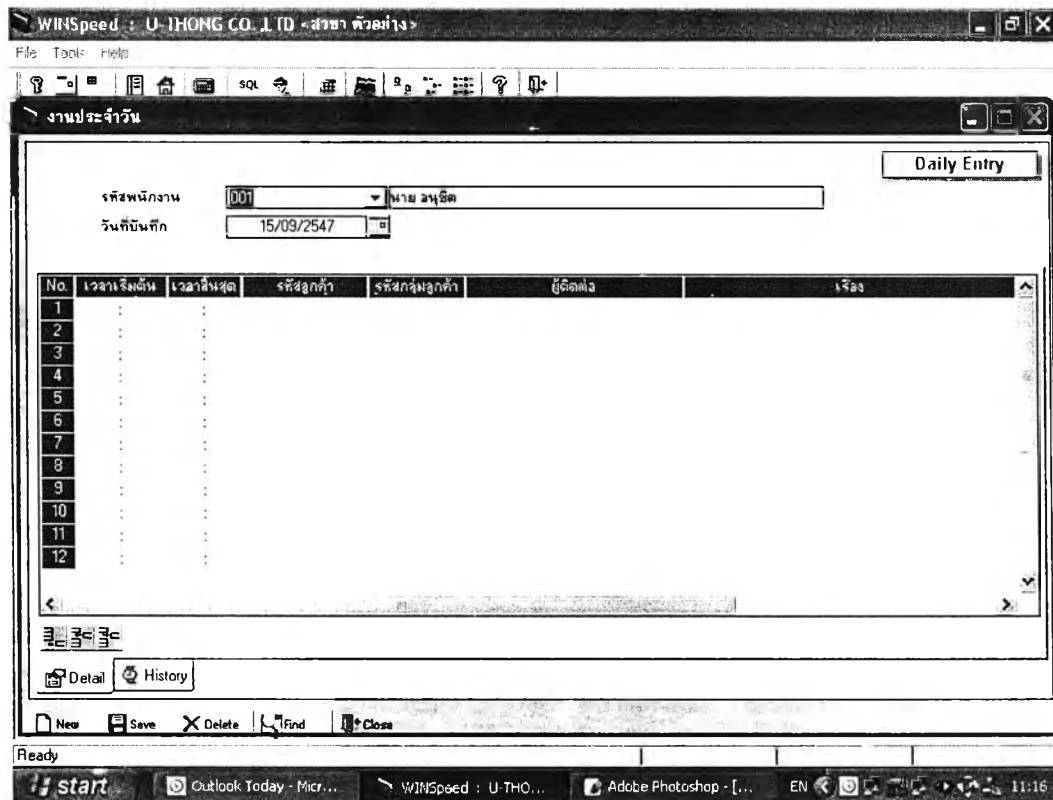


Figure 5.13 Daily entry data

In figure 5.13, daily entry data is the sub-module for the CRM user to input the contacting data that they have everyday with the customer into the system to share the problem, complaint, suggestion, project or etc. that they discuss with the customer. This will help company to understand the requirement of customer and share the same knowledge to every people to give better service to the customer.

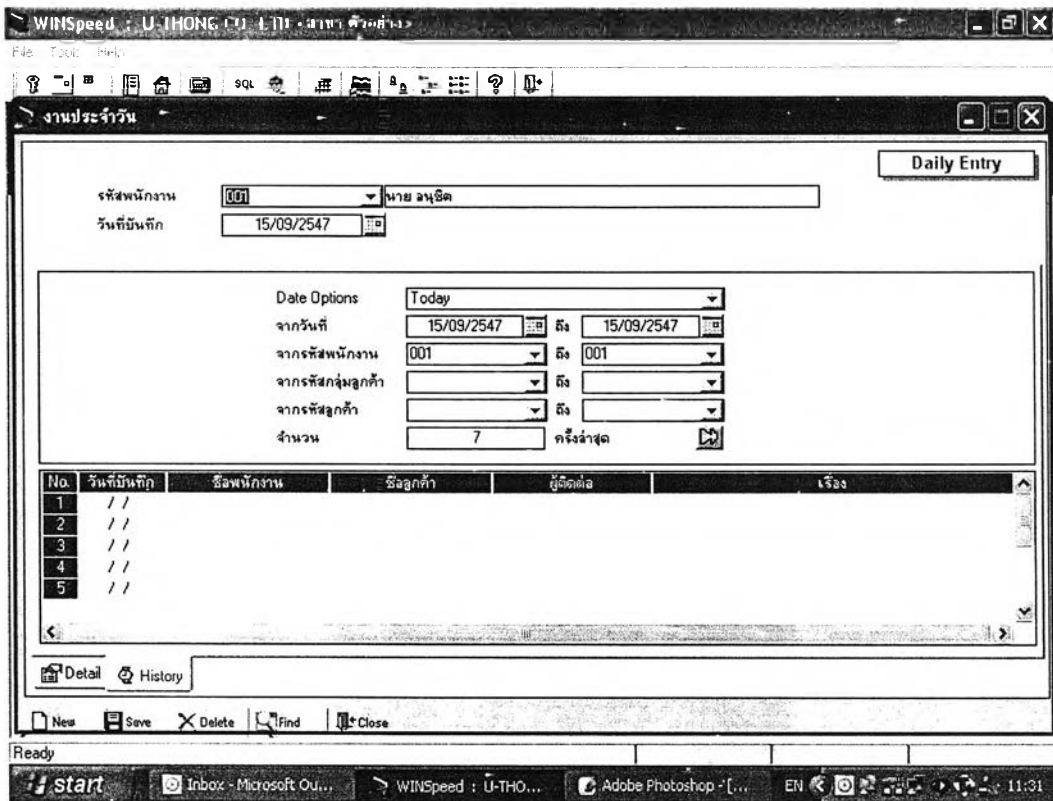


Figure 5.14 Daily Entry data history

In figure 5.14, moreover in the daily entry sub-module, CRM user can access the history data to check the information and retrieve the specific information in the system anytime. This will ensure that all the interaction between people will become the interaction between company and company.

In figure 5.15, another sub module is the contact and appoints which is use for IA to input the data before and after they go to visit customer. This module will help IA to track the customer profile and provide better service to the customer. This information to link to another module that call “calendar” which will show the appointment of each IA to each customer and remind them every time when they login to the system. This module still has history function like the previous module to search for the information in the database to provide the information when they need it also. This will provide all the information that customer use to provide to the

company in the database and any IA does not need ask for the information every time from the customer.

The screenshot shows a software application window titled "ติดต่อประจำวัน/นัดหมาย" (Daily Contact/Appointment) with a sub-window titled "Contact/Appoint". The window contains a form for entering contact and appointment information. The form includes fields for "รหัสพนักงาน" (Employee ID: 001), "นาย นนุชิต" (Mr. Nannuchit), "วันที่ยื่นтик" (Date: 15/09/2547), and "ติดต่อครั้งแรก" (First Contact). Below these are fields for "วันที่ติดต่อ" (Date of Contact: 15/09/2547), "สถานที่" (Location), "ชื่อผู้ติดต่อ" (Name of Contact), "ที่อยู่" (Address), "นางร/ตำบล" (District/Township), "เขต/อำเภอ" (Sub-district/County), "จังหวัด" (Province), "รหัสไปรษณีย์" (Postal Code), "เบอร์โทรศัพท์" (Phone Number), "แฟกซ์" (Fax), "E-mail", "Homepage", "เรื่องที่ติดต่อ" (Subject of Contact), "สื่อที่ใช้ติดต่อ" (Medium of Contact), "สถานที่ติดต่อ" (Contact Location), "เวลาที่เริ่มต้นติดต่อ" (Start Time: 11:32), "เวลาที่สิ้นสุดการติดต่อ" (End Time: 11:32), "วันที่ติดต่อครั้งต่อไป" (Next Contact Date: //), "เวลาที่ติดต่อครั้งต่อไป" (Next Contact Time), and "เรื่องติดต่อครั้งต่อไป" (Next Contact Subject). To the right of the form is a table with columns "No." and "Description". The table has 14 rows, with the first row containing the number "1" and the rest being empty. Below the form are buttons for "Contact", "Appoint", "Description", and "History". At the bottom of the window are buttons for "New", "Save", "Delete", "Find", "Print", and "Close". The Windows taskbar at the bottom shows the "start" button, "Inbox - Microsoft Ou...", "WINSpeed : U-THO...", "Adobe Photoshop - [...]", and the system clock "11:32".

Figure 5.15 Contact and appointment data

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File Tools Help

วางแผนโครงการ

Planning

วันที่บันทึก: 15/09/2547 วันที่รับประจำรายการ: 15/09/2547 วันที่เริ่มต้น: 15/09/2547 เวลาที่เริ่มต้น: 11:32 น.  
 ผู้รับผิดชอบ: 001 นาย สุชาติ วันที่สิ้นสุด: 15/09/2547 เวลาสิ้นสุด: 11:32 น.  
 ผู้มอบหมาย: สถานแผนงาน  
 รหัสพนักงาน: 001 นาย สุชาติ ระดับความสำคัญ: ระดับความสำคัญ: 0.00 %  
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Description

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Ready

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Figure 5.16 Planning data

In figure 5.16, planning data is the another module in CRM which use by CRM user to plan their project and track all the project which is currently in process to keep it updated and avoid any delay in the process.

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File | Table | Help

ลูกค้าสัมพันธ์

รหัสพนักงาน: 001 นาย อนุชิต วันที่บันทึก: 15/09/2547

รหัสลูกค้า: [ ]

วันที่ติดต่อ: 15/09/2547 สถานะ: [ ]

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เรื่องติดต่อเสร็จต่อไป: [ ]

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Ready

start | Inbox - Microsoft Ou... | WINSPEED : U-THO... | Adobe Photoshop - f... | EN | 11:33

Figure 5.17 Customer relation

In figure 5.17, this module is designed for customer support to use when the customers have any complaint, feedback, return product or anything about the product and service. The customer support will input the data and use it to track all the data until get the result to close any case. This will help the customer support as the knowledge database for them to access and provide the data the customer more accurate and faster and same as every module that the user can search for the history and study the past to improve the future.

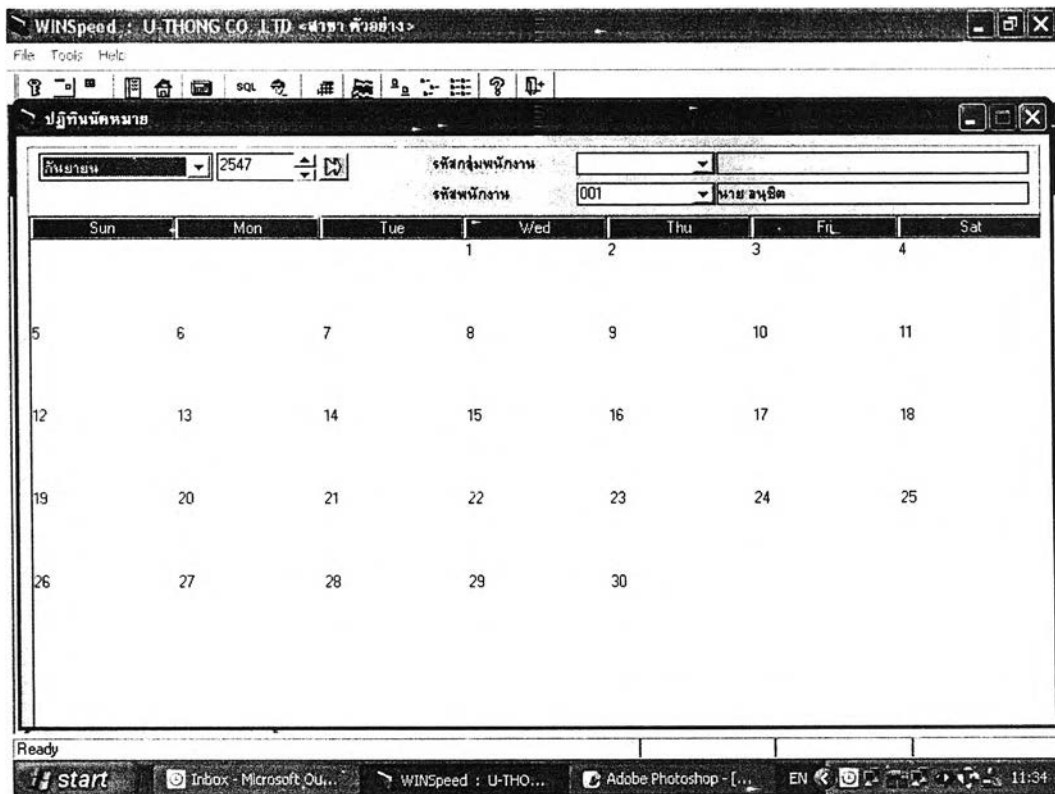


Figure 5.18 Calendar

In figure 5.18, This is the calendar function that mention in the contact and appointment module that the data in will link to the calendar and book as the organizer for the IA to check what they need to do every day or which company that they already make the appointment to avoid any problem and duplicate appoint on the same time. This is also use for the sales manager to track all IA activity during the working time too.

Another category for the CRM module is the report in figure 5.19, 5.20 and 5.21, this is very important tool for the CRM project because marketing team and management team of company need to evaluate the data and performance for the IA, customer support, product and services to improve the performance and reduce the cost as much as possible. The following figure will show some basic report that come with CRM module. Nevertheless, any new report, company can set it up later when the user or management level required.

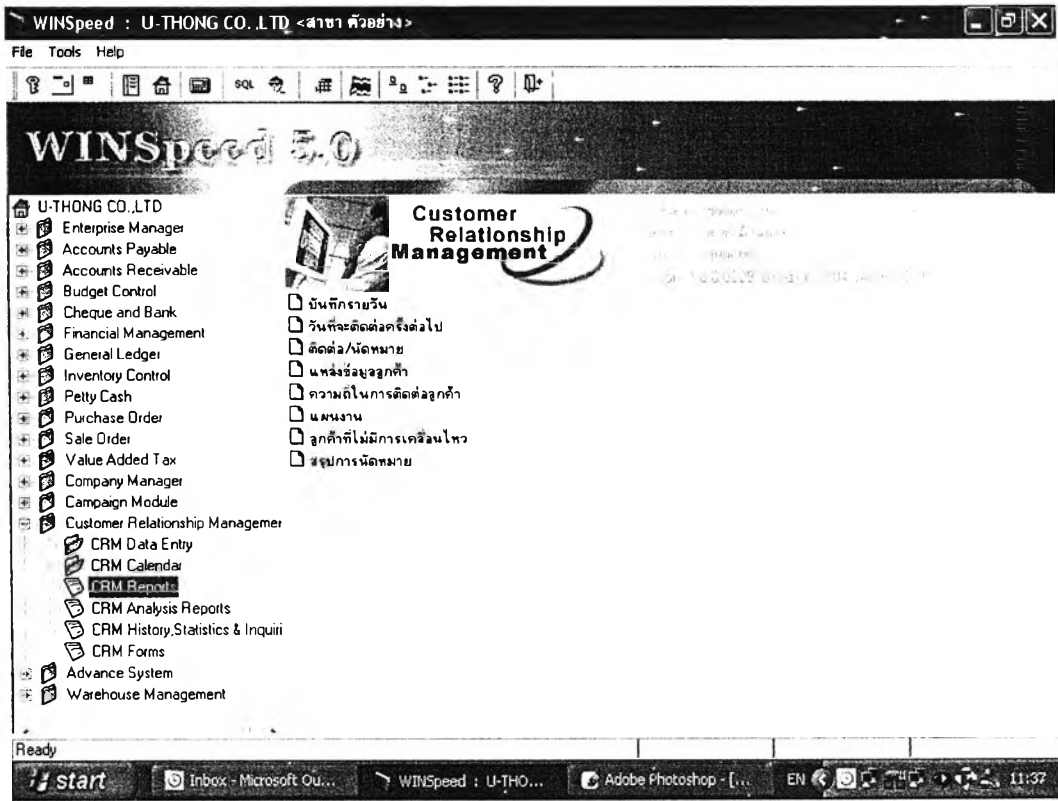


Figure 5.19 CRM reports

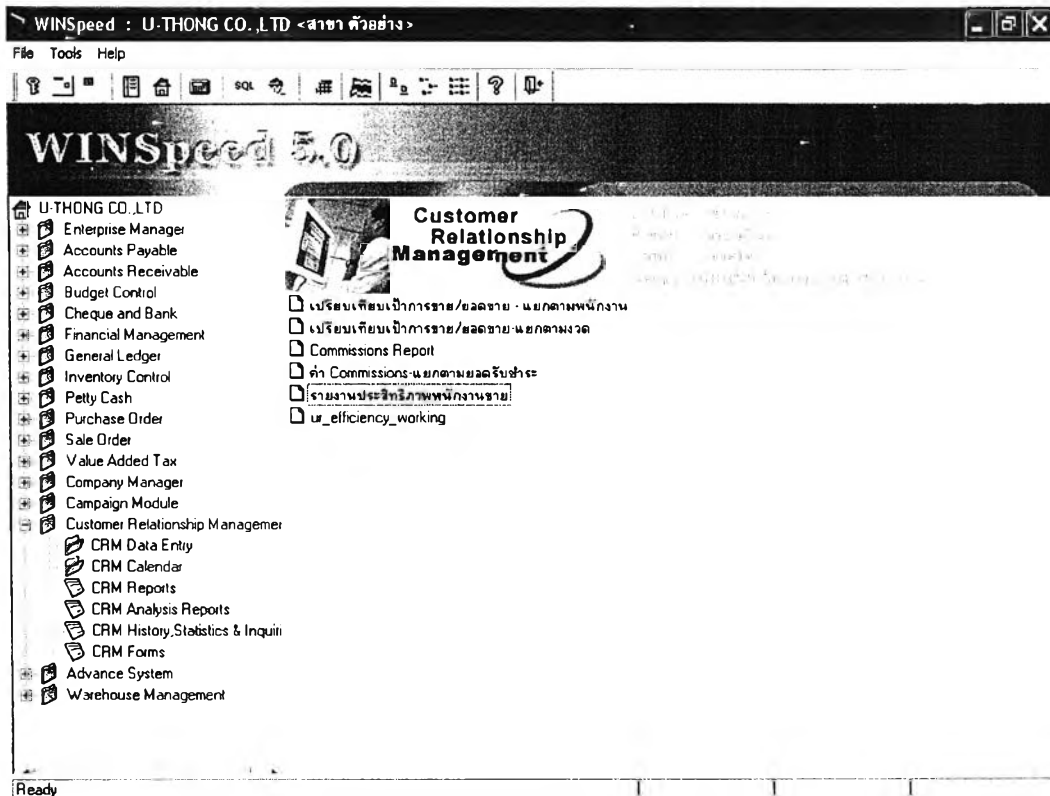


Figure 5.20 CRM analysis reports

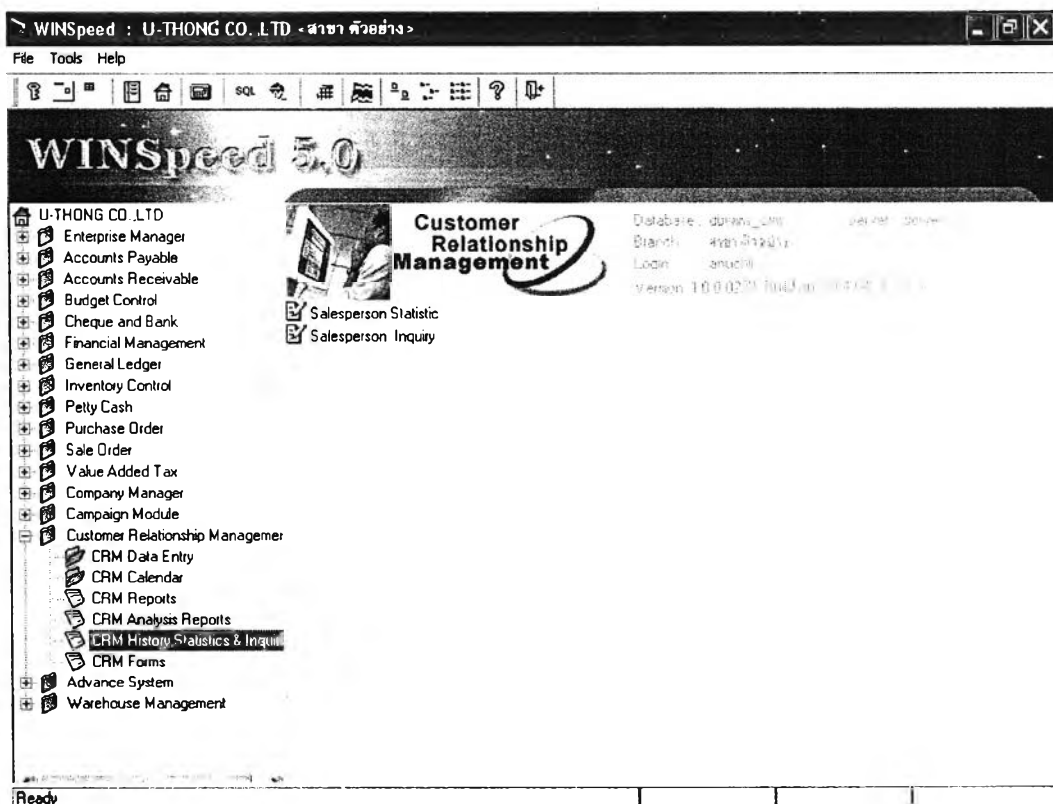


Figure 5.21 CRM history, statistic &amp; inquiry report



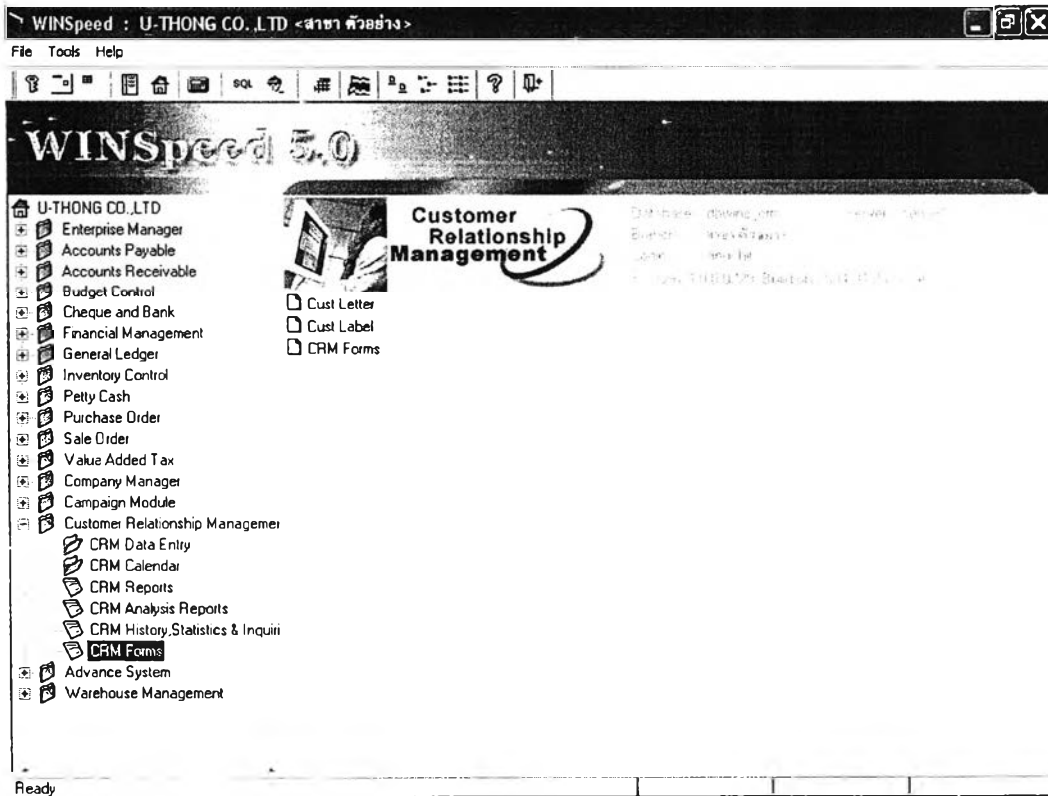


Figure 5.22 CRM forms

In figure 5.22, this is the CRM form which use for the marketing department to create the form which is letter, label or any promotion letter and send to the customer via mail or email from the information in the customer data. This is the tool to save marketing officer time to do it in the future.

From the data and software capability, UT can create any report which is suitable for the business which no need for the skilled person or programmer to do it. Therefore, any marketing officer can generate the idea to come out the any marketing campaign more easily than before and faster than before.

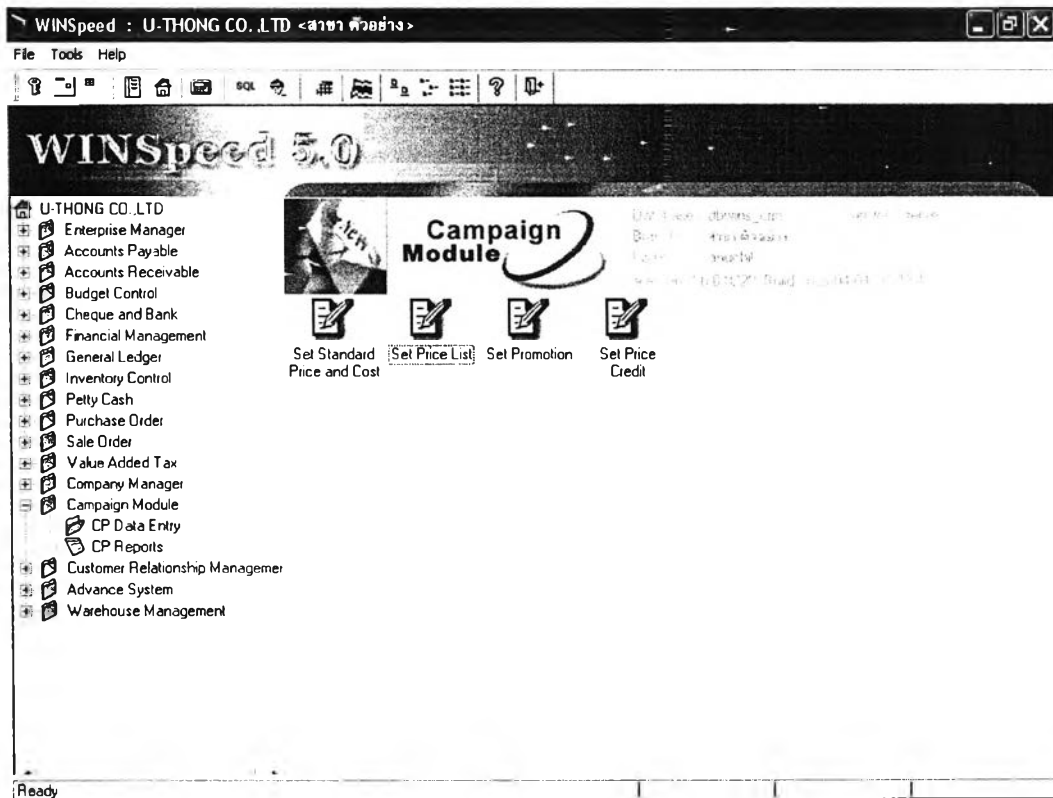


Figure 5.23 Campaign module

Figure 5.23, this module will help the marketing team when they initiative a new campaign in price to share the information to every department in company. It is not only share information but it also link to the account department to calculate the commission, track all campaign and control inventory for the campaign too. This module will reduce the conflict between each department to gain the same information and prevent the customer support to put the wrong price in the invoice too.

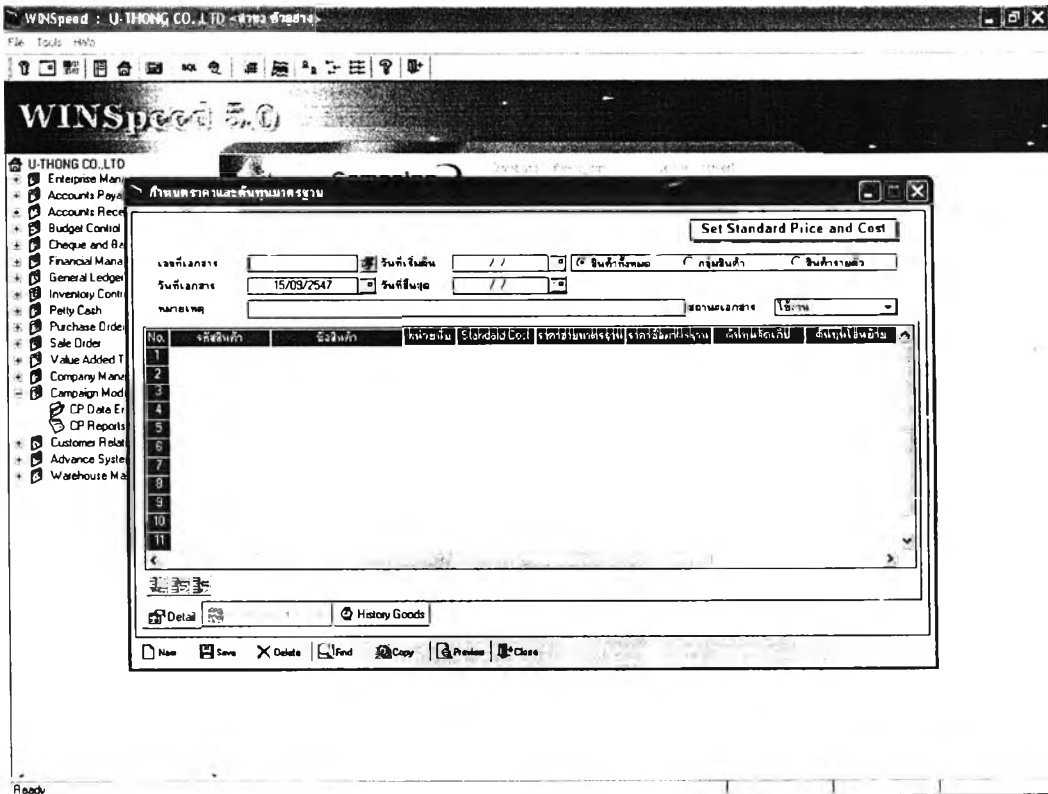


Figure 5.24 set standard price and cost

In figure 5.23, Campaign module consists of 3 sub module which is standard price and cost, price list and promotion. First, standard price and cost is the acceptable value that market expect for example standard price is a price that customer accept to buy or used to buy it before which mean if any company can offer the same quality with this price, it is an acceptable condition for the customer.

Figure 5.34, standard cost is for company which the purchasing manager needs to control the cost to be at least on this point. Second, price list is the list price for each product in the company because most of product is import product and the cost will related to currency exchange so the price list will change more often sometime twice a month so this module will help the whole organization to share same and most updated information. Third, promotion price is a price for some special event which will come from the marketing department to gain more profit for the company.

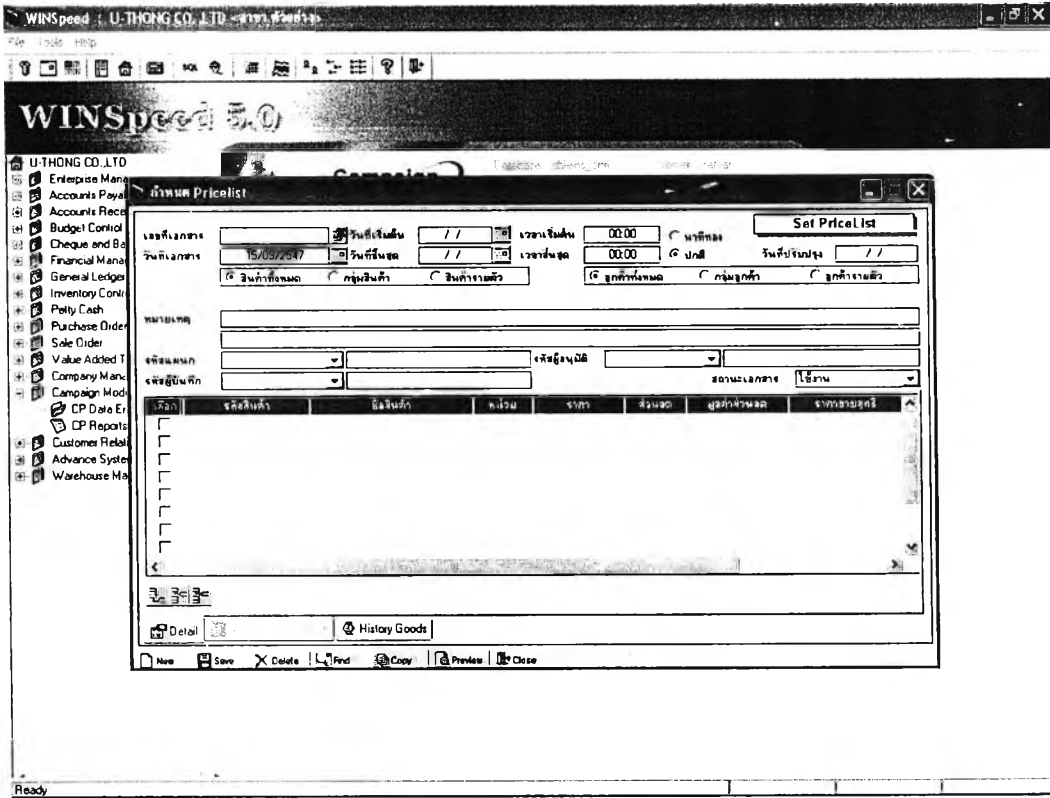


Figure 5.25 Set price list

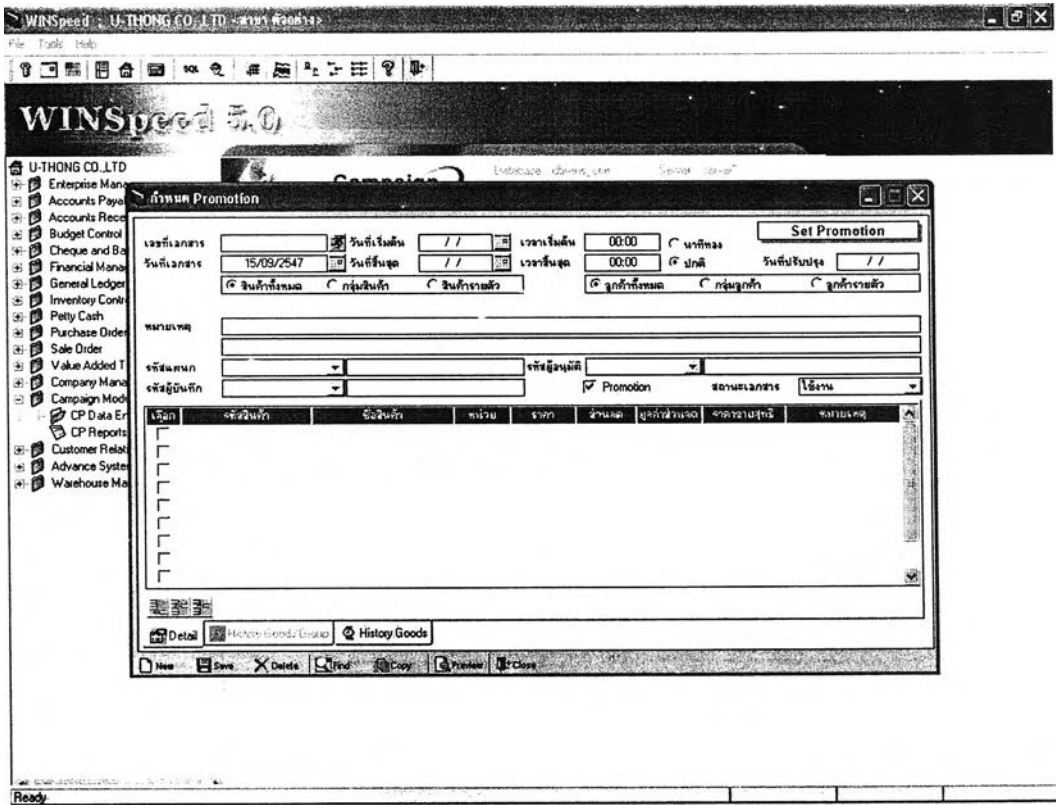


Figure 5.26 Set promotions

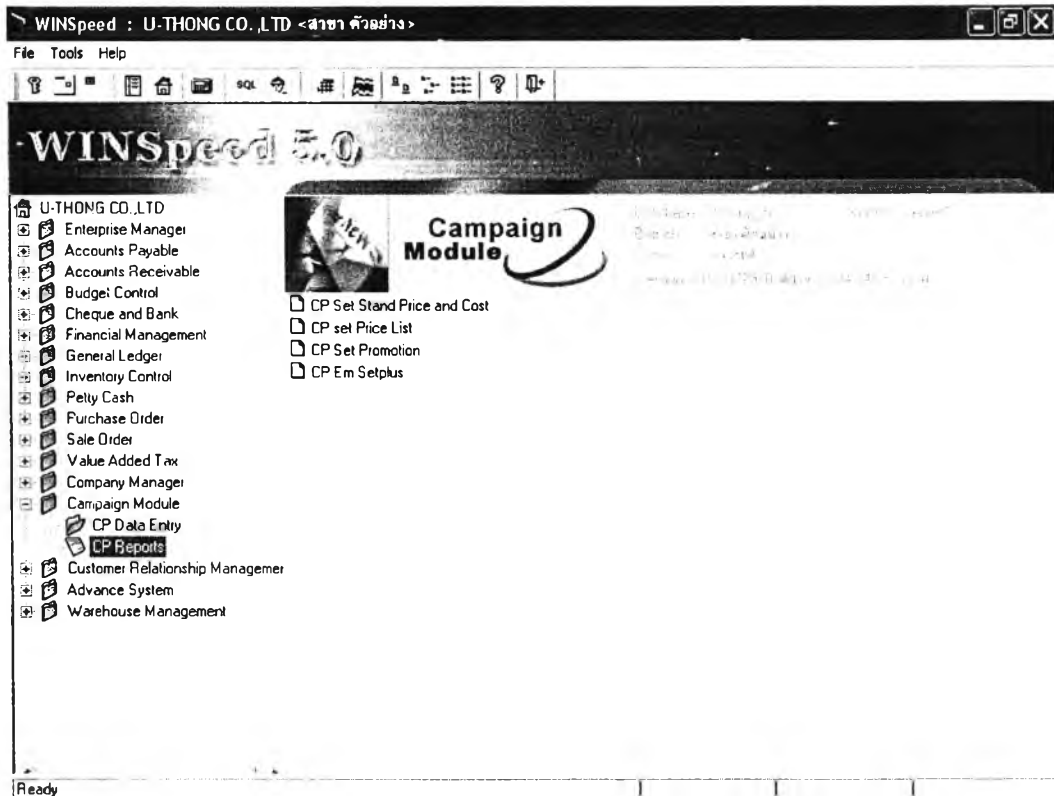


Figure 5.27 Campaign report

Again figure 5.25, 5.26 and 5.27, this sub module can generate the report for the management and marketing officer to evaluate the ROI of each element.

This software will help CRM team to do their job more efficiency and effectiveness. However, the software itself can not do anything about the CRM but company needs people to operate the system. Therefore, people are the most important factor in this project and need to give the skill and knowledge to them to use the system. So the training is the most important factor for this project, HR manager need to setup training time table for each employee and manage to find a people to train them to use the system properly.

From the CRM software, company will have the capability to record all the customer data and all activity between customer and the company to use as the data to in the future which include the customer relationship management.

## **5.4 CRM PROJECT**

From all above information, finally the company comes out with the CRM project that had been implemented in the company since beginning of year 2004. After implementing the CRM strategy and software, the CRM team uses the data in the computer system to create the CRM activity to improve the customer relationship between company and customer.

This activity had the objective to improve the relationship between company and existing customer by providing the updated information, newest technology, special priority, and executive service.

### **5.4.1 Special priority and executive service**

CRM team use the data and historical record in the computer system to separate the customer type to specific the service for them as follow.

- Gold class service: the customer who buy the product and service from company more than 1,000,000 baht per year.
- Silver class service: the customer who buy the product and service from company more than 500,000 baht but less than 1,000,000 per year.
- Bronze class service: the customer who buy the product and service from company more than 200,000 baht but less than 500,000 baht.

After the project team categorized the customer into 4 categories as above mention, the company had 9 gold class members, 23 silver class members, 98 bronze class members and 540 normal class members. Then project team setup the project to discuss with the gold, silver and bronze class member to ask them about the factor how they decided to use the product or service from any industrial equipment company and the result is show as follow in order of priority..

1. Emergency service when the system is fail and need to be replace as soon as possible because the cost of production time is extremely high when compare to the cost of product and service itself.
2. Reliability of product and service when the customer used it in their plant.
3. Price of product and service.

Most customers want any industrial equipment company to give them the service to run their production cost as low as possible while one of major production cost is down-time from the process. Therefore, most of them want company to offer the product and service to improve the mean time between failures and reduce the down-time as low as possible.

So after the project team got the information from the customer, the project team had been setup the executive service for company's value customer to improve service and fulfill their requirement to keep them as company's loyalty customer in the future.

#### **Gold Class Service**

1. 50% discount from company's product and service.
2. 24 Hr emergency on-site service from technical support department without additional charge except cost of spare parts.
3. 24 Hr guarantee delivery to customer site.
4. 4 times on-site product training and seminar without additional charge.
5. Unlimited in-house product training and seminar without additional charge.
6. Replacement equipment during the period of repair (Only ex-stock item)

#### **Silver Class Service**

1. 47.5% discount from company's product and service.
2. 24 Hr emergency on-site service from technical

support department without additional charge except cost of spare parts.

3. 48 Hr guarantee delivery to customer site.
  4. 2 times on-site product training and seminar without additional charge.
  5. Unlimited in-house product training and seminar without additional charge.
- Bronze Class Service**
1. 45% discount from company's product and service.
  2. Office time on-site service from technical support department without additional charge except cost of spare parts.
  3. 2 times in-house product training and seminar without additional charge.
- Normal Class**
1. 25-40% discount from company's product and service.
  2. Office time on-site service from technical support department with additional charge.

This service is for the company's value customer which will help company to improve the service level and gain more customer loyalty to the company and increase the switching cost and harder to change from company to competitor.

#### **5.4.2 Company magazine**

In order to provide more information and improve the communication and relationship between company and customer, CRM team decided to launch UT magazine which will provide any news, product information, new technology, new service and etc to the customer. This magazine issued 4 times a year in each quarter and send it to customer via mail and email based on the customer information in the CRM system.



This magazine also provide the feedback form for customer to make the recommendation or feed back to CRM team inside company to use as the data to improve the service in the future.

#### **5.4.3 Company product article**

Industrial equipment is a component in the manufacturing process and each business will use the different process. Therefore, company should give the information about the product application and knowledge in specific information to specific industry.

So the CRM team used the data in the computer system to separate the industry type as follow.

- Waste water treatment
- Pulp and paper
- Cement
- Chemical
- Petrochemical
- Textile
- Food and beverage
- Pharmaceutical
- Refinery
- Sugar
- Electronic
- Steel Fabrication

Then request the product application in each industry type from supplier and engineering department especially the application that company used to successfully design for the customer to made the article for the CRM team. This article will contain about the product application in specific industry, the benefit of the user who use this product.

This article will provide the new technology and product application for user to understand more information and the benefit of the product in their business to increase the revenue in each customer for the company.

## 5.5 CONCLUSION

Industrial equipment business is a business to provide the industrial product and service to the customer. The company can not generate the demand by themselves but company need to wait until customer want to use it in a replacement situation or a new project plant. Therefore, all marketing activity to find a new customer must not aim to generate the demand but aim for provides them the right information in the right time.

Provide the right information in the right time, is a very easy to say but very hard to do it if company do not have customer information. Therefore, company needs the information about customer in every aspect to analyze their business to create the right marketing activity for them such as company management style, business type and etc.

From the customer information, marketing department could use it to increase revenue by finding more new customer to become the loyalty customer for the company. In this project, marketing department decided to launch the marketing activity as follow.

- Company magazine, which will provide the company activity to each existing customer and prospect customer which will become the customer in the future.
- Product application journal, This journal will come from the engineering department or the manufacturer to provide the information about the product in specific application in specific business such as the control valve to control the humidity in the pulp and paper industry. This will help the customer to understand more in the product

and provide them the new technology to improve their process in term of cost and performance.

- Executive service for value customer, this service will provide for the value customer for company only to keep them as the value customer for the company as long as possible.

From all above CRM project, company expected to increase the customer satisfaction, customer loyalty and company profitability by using this approach. In order to measure the result of this project, company need to setup the evaluation system and collect the data before and after implement CRM in the company. This detail will explain and show in the next chapter.