SUCCESSFUL IMPLEMENTATION OF CRM AT A CREATIVE AGENCY AND ITS IMPACT ON CLIENT MANAGEMENT AND INTERNAL OPERATIONS

Submitted by: Maliha Mushahid
MBA 2K13 - B

Successful implementation of CRM at a creative agency and its impact on client management and internal operations

SUBMITTED BY

Maliha Mushahid

SUBMITTED TO

Faqir Taj

PROJECT/THESIS ACCEPTANCE CERTIFICATE

Certified that final thesis of **MBA** written by **Miss Maliha Mushahid** (Registration No: **NUST201361849MNBS75013F**) of **NUST Business School** has been vetted by under signed found complete in all respects as per NUST statuses/regulations, is free of plagiarism, errors and mistakes and is accepted as partial fulfillment for award of MBA/MS/Mphill degree. It is further certified that necessary amendments as pointed by GEC members of the scholar have also been incorporated in the said thesis.

Signature: ________________________________

Name of thesis Supervisor: Faqir Taj

Date: ____________________________________

Signature (MBA Program Head):____________________________

Date: ____

Signature (Dean/Principal):_________________________________

Date: ____

TABLE OF CONTENTS

ACKNOWLEDGEMENT

Thanks to Allah Almighty for giving me courage to complete my thesis. I am very obliged to my parents & my siblings for their generous assistance and reassurance which helped me in finalizing this work. Special acknowledgments to my thesis supervisor Sir Faqir Taj for his time, support and guidance throughout my thesis work.

Huge thanks to managing partner at the creative agency for providing me with all the highly qualitative and factual information and support during the project. I cannot forget to mention my class fellows and friends at NBS without which this thesis would have been a distant reality.

Maliha Mushahid

Abstract

An increasing number of creative and advertising agencies around the world have realized the significance of building and maintaining close relationships with clients in today's competitive economy. As more and more firms in Pakistan have started to recognize the importance of becoming client centric they are implementing CRM systems as a part of their business strategy. Using the right CRM has proven to increase revenue, refined the process for scoring leads, improve sales pipeline stages and improve internal work processes for agencies. The case study presents a successful implementation of a CRM system in a creative agency in Pakistan to facilitate long-term effective relationships with clients, improve internal work flow and boost information sharing culture between employees.

Introduction

Every serious business owner wants to get that edge and stay ahead of competition. These businesses will try to rank first on the pages of major search engines e.g. Google, Bing etc. They rely on a number of consultants, SEO firms, advertising agencies etc. That is when the role of a creative agency comes in. These agencies focus on commitment to their clients and are all about customer and client servicing and preserving their relationships. An agency also has an obligation towards their employees to provide them with a great working environment and the idea their workplace creates the best work for them.

What many creative agencies are not currently using is a CRM system. Agency executives need to manage multiple clients at once and cultivate a healthy workplace environment for the employees. In short these client service managers are accountable for all aspects of the delivery of work from the client to the employee and back to the client. The executive's role goes beyond delivering what the client wants, they have to analyze markets and develop strategies for the clients company. (Alyson). In a study conducted by 'Teachvalidate' when creative professionals were asked what were most common problems they faced in daily business operations before they implemented CRM a majority of 64% of the respondents answered that organizing information was their biggest issue, then managing clients and lastly managing projects. CRM systems specially designed for creative agencies have three main features that help executives overcome this problem contact management, sales pipeline management and integrated project management. (Techvalidate, 2016)

This paper will lay emphasis on the importance of having a CRM system for business operations to run smoothly and efficiently, and support the growth of the company over time. The paper is organized by first describing the concept and definition of creative agencies and CRM systems and the relationship between the two. Following the literature review will be a descriptive analysis of the pre-selection factors, selection, implementation and results of using a CRM system as a major tool for running operations and managing better relations with clients.

Basic objective of the paper is to see whether a CRM system will result in actual improvement of relationship with clients, deployment of employees, improving internal operations leading to enhanced strategic decision making. It is of utmost importance that executives don't fall into one of the many pitfalls of CRM implementation. The many pitfalls are a consequence of a single flawed assumption that any CRM tool will manage client relations for you but that is not the case, whereas CRM is the bundling of customer strategy and processes, supported by relevant software for the purpose of improving customer loyalty and profitability. (Darrell K. Rigby, 2000). The main goal of the study is to assist creative agencies in the CRM implementation process.

Proposal

Problem statement

Creative agencies have an air of mystery around them, since the term is very vague especially in Pakistan. A proper definition is that a creative agency combines strategy, design, marketing and digitals services to create content that solves the problems, objectives and goals of the client. In simpler terms, creative agencies are hired to solve multiple problems, they can be responsible for making a customer decide between two alternative products or services, and they can be the reason why a potential customer will click on your website and stay on it more or less than five seconds. The success of a creative agency depends on two major factors, the service quality associated with service output and performance and the relational exchange between the client and the agency. Since the projects can be long term or short term, each project holds equal importance in developing the reputation of the agency. Studies have revealed less than half of marketing agencies use CRM's, which is not the right move if the agency wants to maintain a reputation and survive in the hyper competitive environment, client satisfaction and retention is of immense importance. This thesis paper will highlight the importance and highlight the benefits of implementing and using CRM technology to achieve client satisfaction and improved internal workflow.

Objective

Keeping in view what has already been mentioned in the introduction and problem statement the idea of the research paper is to study the implementation process and effect of a customer management system on the internal work flow and role in managing clients for creative agencies.

The conclusion of this research will provide a clearer view to agencies on how to select and implement a CRM system that best compliments their work flow and client management methods.

Literature Review

Customer relationship represent a firms' most valuable asset, this statement is truer than ever, especially for agencies. You need to know exactly who your potential clients are, how to contact them, what kinds of services they are interested in, and how much revenue can you generate by making them your customers. Why is it so important for an agency to know all that information about their client? Clients are now more enthusiastic than ever, with the help of the internet clients have far more choices and with just a few clicks allows them to check for competition for better rates. Churn rate has gone up, a paper suggests even a company with an striking 90 percent retention rate will lose more than half of its customers in five years.

In a small businesses it is possible for managers to really know their customers on personal basis, as the business grows it becomes less and less possible to know every client in an intimate way. In marketing agencies departments tend to be somewhat compartmentalized, minimum information about the client is shared with the departments, the information is stored and organized in terms of that persons account with the company. Without a Customer Relationship Management system there is no possible way to consolidate all of the information relevant to that one client in a unified view. CRM's capture and integrate data from all over the organization, consolidate the data, analyze the data and then distribute the results across the firm. (Kenneth C. Laudon)

There is no single way to define the term customer management system (CRM) mainly because of the different academic backgrounds of academic researchers. CRM has been projected to be a $36 billion market by the end of 2017, but even now CRM is still an emergent perspective and needs more time and studies to reach the consensus for a definition. One of the most current and holistic definitions of CRM is "CRM is the building of a customer-oriented culture by which a strategy is created for acquiring, enhancing the profitability of, and retaining customers, that is enabled by an IT application; for achieving mutual benefits for both the organization and the customers". (K.Rababah, 2010)

After understanding the definition of CRM there is a need to know the general distinction between three kinds of CRM's. Operational CRM assists in the front office processes. Analytical CRM is built on operational CRM and establishes information on customer segments and behavior by means of statistical methods. And lastly, collaborative CRM concentrates on customer integration using a concentrated mix of multiple channels. CRM is now understood as a customer-oriented management approach where information systems provide information to support operational, analytical and collaborative CRM processes and thus contribute to customer profitability and retention. (Alok Mishra, 2009)

Defining a creative agency is not very simple, especially since creative agencies are a relatively newer concept. To broadly define it, a creative agency is a company that offers a combination of strategy, design, and technology and advertising services to clients. The services offered by creative agencies can be broken down into four major categories, strategy, design, technology and advertising. Strategy represents planning consulting and research services. Design is the visual, photography and videography services. Technology is engineering, data and systems services. Advertising is the promotional PR and other marketing services. (Pullen, 2013).

Creative agencies happen to have a lot of contacts and business customers to manage. Whether they operate as a full-service PR and marketing agency, a graphic design business, or a videography outfit, they very likely have multiple companies to work with on various projects. While a small agency might be able to manage a few contracts worth of contacts on their own, over time, as the business will grow they will need a tool to keep track of everything.

Every professional introduction and business card an account executive receives represents a wealth of opportunity. Developing new connections as leads clears path for the account executive to make contact and treat the opportunity as a business opening. This type of work involves plenty of incoming inquiries for work and sending out equal number of bids. Without a CRM solution that matches with your business objectives and processes the agency is relying solely on a combination of assorted bid templates and chaotic email threads. Account executives are left waiting on potential clients to get back to them if they don't have a tool for organizing and tracking bid built into their process. (Steinmetz, 2013)

So far studies have suggested all the significant improvements and efficiency in the workflow are identified after implementation of a CRM. Mosad Zineldin suggests in his paper, the key ways to build a strong competitive position are through customer relationship management. The company must be ready to deliver value beyond just the core products and services of the company. (Zineldin). But agencies must also watch out for the major perils of using CRM's. The promise of customer relationship management is quite captivating; due to CRM's being popularized as cost reducers and customer acquirers. The instant the CRM doesn't work, the situation can lead to giant debacles. The first peril is to implement a CRM system without having set a customer strategy. CRM systems will support your current strategy and eventually become a part of the solution provided by a firm. A CRM should only be installed after the firm has created a customer focused organization. If a company wants to maintain better relationships with their profitable clients, it needs to first refurbish key business processes that are relevant to clients from the project brief to project completion. In order to make CRM implementation successful, after all business processes, job descriptions, performance measures, compensation measures, compensation, employee training etc has been restructured in order to better meet customers' needs. (Darrell K. Rigby, Avoid the four perils of CRM , 2006)

CRM's are now developed in such a flexible manner that they support every kind of organization, most recently, marketing firms. CRM systems now support direct-marketing campaigns by providing the capability to capture customer/client data, for providing service information, for targeting leads for targeted advertising, for scheduling and targeting emails etc.

Marketing modules contain tools for analyzing marketing and client data identifying profitable and unprofitable clients.

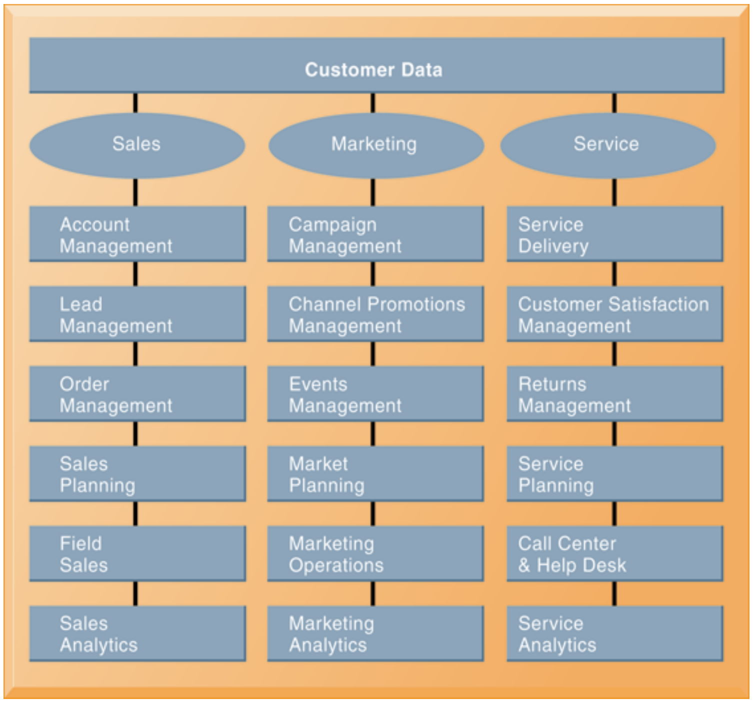

Figure 1: CRM software capabilities (Source: Management Information System, Kenneth C. Laudon)

In figure 1 (Laudon, p.353) shows some of the capabilities for sales, service and marketing processes that are found in many CRM software's. CRM's are business process driven that incorporate hundreds of business processes that are meant to represent best business practices. If an agency wishes to get maximum benefit, they should revise and match their business processes to the best practice business process in the CRM software.

Studies show that CRM solutions help to professionalize sales and bidding processes. To some professionals, CRM solutions are considered as a simple address book. But a CRM software is more than just an address book, it intends to incorporate enhanced technology with the business to provide a competitive edge. Agencies who have implemented CRM's have found creative ways to use their CRM software's to power their entire firm, from pitches and selling campaigns to fulfillment, approvals, invoicing and as a communication tool. CRM software's and sales acceleration tools allow individual account executives and their teams to deliver incomparable client experience and score new businesses. (English, 2015)

Hypothesis Statement

- (H1) Implementation of a CRM system will improve internal business processes
- Improve client management for creative agencies.

- (HO)Implementation of a CRM system will have no effect on the current internal business processes
- Client management for creative agencies.

Research Methodology

The case study was based on primary and secondary data. The two main approaches used for primary data collection data were direct observation and participation and unstructured interviews. The natural setting of the firm was observed and working as an account executive, there was available information and input from other account executives and the managing partner on the issues with the previous methods of interacting with the clients. The business processes of the firm were studied and documented. The issues that arose due to the absence of a CRM system causing inefficiency in the workflow and client management were also observed and documented. After the implementation was completed, information was collected through interviews with direct account executives on the performance of the CRM.

The secondary data was collected through research papers, websites, case studies, articles and journals.

Primary data sources:

- Interviews
- Direct Observation

Secondary data source

- Journals and previously conducted case studies
- World wide web, company content (business processes)

Case Study

5.1 Organizational Background

The organization is an innovative, culturally diverse communication group, present on three continents. Their main services include branding, naming, online and offline advertising, social media, business optimization, film marketing, web design, developing creative strategies, market research, graphic design, 360 brand custodianship social and political marketing. The organization aims to be the number one in each market in terms of innovation and client satisfaction. The organization aspires to create a meaningful relationship between the clients' brands and the target audience by coming up with ways for clients to stay in touch with the real needs of the customers.

5.2 Business Process

The company has highly skilled graphic and content designers, web development executives, and digital marketing analyst and ad film specialists. The business processes revolve around these employees, and hence the company was in need of a CRM that was tailored to best fit their existing business processes.

The business process starts with connecting and networking with potential clients. Following the theory of 'six degrees of separation', which suggests that all living things and everything in this world is six or fewer steps away from each other so that a chain of a friend of a friend can be used to connect with anyone through maximum six people. This is an influential concept when it comes to professional networking. Using this concept you'll know you are only a few steps away from a new client. Social media serves as an opportunity to build relationships, rapport, and to help professionals from around the globe to connect with each other.

The managing partner at the firm believes, as a self employed individual, building strong networks is a necessity, a number of the graphic designers and web developers and clients were picked up through connections and online relationships. For the younger professionals viewing connections as collaborators and defining your relationship as a two way street is a hugely positive experience. The connections made throughout the career of the managing partner are important to him for two reasons:

1) That is where the second opportunity may come from
2) You can easily find people to help with a job or collaborate on a project.

After a thorough process of networking and scoring a client the client briefs the agency about the project that needs to be done either by filling a brief form or through text or popularly through phone calls.

The accounts team managing the clients generates a meeting call report. The brief provided by the client is discussed among the team members. The account executive requests a job number from the project manager who then issues one. Once the creative brief is approved and discussed by all members, a meeting takes place to discuss further details. An estimate is decided internally including the production department and approved from the head, in our case the managing partner. The estimate is shared with the client and work begins.

Scheduling is the most important part of the business process because the timeline is shared with the client, and any lag affects the image of the organization as a whole. The project Manager plans the schedule and gets approval by the creative & production team before forwarding it to the account executive. The schedule is then approved by the Account Executive and shared with the client. Once the client has approved the timeline, official work begins. It is the responsibility of the project manager to keep the client up to date and maintain the schedule.

It is the responsibility of the account executive to update the weekly client status report. Weekly agency status meetings are held to review client status reports and discuss the progress, issues etc. In case of delays the project manager updates the master schedule to reflect changes given during meeting and distributes it to the client and floats it internally.

The project manager schedules a meeting each morning to discuss the work that lies ahead for the day. All team participants, i.e. the account teams, creative director, production, are required to provide input to the project management team with regard to work needed for the upcoming day.
Work is planned based on the master status report; the daily schedule reflects any changes that occur during the week. Team members can use it as a guide to determine what work is needs to be prioritized. If there is work that is not on the schedule for that day, the account executive should be required to meet with the appropriate project managers and assigned person before work begins. No team member should give out work without informing the relevant project manager.

When the account executive gets approval of the client for the estimate, accounting department is notified to initiate the invoicing process. The project manager has the duty to plan all internal work related meetings. Any jobs not covered under a fee based arrangement, should not be started without signoff of an approved estimate and the media schedule. Final estimate amounts should be distributed among the production team. This is mainly how the process is planned out, but due to the unavailability of a proper system work assignments, documents, schedules are misplaced and cause delay in deliverable deadlines.

The project manager maintains all work internally; making sure deadlines are met within each department either related to creative design work or production. A constant check is kept In order to make sure the master schedule is on track, without a proper system in place keeping a check on all design work becomes an issue. The project manager works close with the creative

designers to verify availability of other designers for different projects that arrive on short term notice.
When the job is completed, the digital design department creates a final digital copy and puts it in a presentation to be presented to the seniors.
When routing the agency work, it is kept in mind that circulating work throughout the agency is a time taking process. If a key person is not available to sign off on the work, proper account executive is notified to ensure that there is a replacement signature.

When the project is completed the job or design is presented to the account executive, project manager and the managing partner by the:

- Art Director
- Copywriter
- Creative Designer

For external presentation to the client, the members included in the meeting are:

- Art Director
- Copywriter
- CD
- Account Executive
- Managing Partner

After the first presentation there may be a series of revisions and editions and lastly the final release.
The account members regularly meet with the creative team to discuss the client brief, projects, and to discuss the timelines.

The Account Executive is responsible for a number of things, both internal and external including all client copy and art approvals. The account executive sends the client the desired artworks for either printing or to be posted on social media for approval keeping in mind the submission guidelines.
Internal reviews are required prior to presenting work to the client.

For all written material required by the client, the Account Executive provides the copywriter (and other team members) with clients requirements, holds a meeting with the copywriter and the project manager, copywriting normally comes with design or web development work so the technical team and design team are included in the meeting as well. Copy is proofread and routed internally before sharing it with the client. Upon mutual consent, copy is forward to the art department. Usually the copywriter and art director work together as a team.

The account executive is responsible for informing the client of any additional costs and getting their approval with an accurate media schedule and the right change order form. He then reviews their changes with the project manager and they make sure all corrections are understandable before handing over to the staff for changes.

It is important that the client is made aware of some important facts concerning their responsibilities in approving creative or media schedules. Many clients intentionally or unintentionally forget the responsibilities on their part. They are responsible for approving the schedule, and should return the email the required documents back to the agency in a timely fashion. The agency time and time again reminds the client that if the documents are not returned by the specified time, the project can be delayed, and the client will be responsible for the after effects. Another thing the clients fail to understand is that the excessive changes cause the schedule to be changed. These changes are merely mentioned on phone calls and not documented. This lack of a proper CRM system to document changes in briefs had been causing many issues in the organization.

A part of the many responsibilities of the Account executive is to circulating the creative design, layouts, copies for posts and websites, artworks for social media and outdoor advertising, storyboards for videos, scripts and media schedules directly to the client. Although the account executive does get a “final signoff” from the client, is does not end there, the account executive is accountable for ensuring that the client’s editions were made to the client’s satisfaction. Client changes and approvals are repeated until final client copy/layout gets the approval—at which point the account staff would notify the project manager to forward the changes to the designer for further editions. The preproduction meeting would be scheduled before the layout is being turned into a final produced creative concept.

After client approves a creative concept, the art director with the assistance of one or more designers design the piece and make final selections on the execution style, they’ll also need the photographer. The art director then meets with the production and account team to discuss the costs of the artwork. Client approves supplementary costs if needed. The shoot and post production take place, and the PM keeps the account personnel informed of client approval needs, timing and changes. The work is then approved internally before being presented in front of the client.

The Media team produces the media schedule based upon the clients requirements and the approved internal schedule. It is the Account Executive’s duty to follow up with the departments to make sure the manager is meeting the deadlines. If the creative, copy or art materials come in late on the project manager’s timelines, he must make sure that he changes the media schedules to reflect a realistic date to meet the publications’ closing dates. Media team would call all media sources to recheck if the media schedule information is accurate. Traffic would follow up with the media to ensure that the materials have been received on time.

The project manager has the responsibility of circulating any final materials with the latest client sign off for final internal approval proofreading. When the material is approved, the project manager makes additional copies of the material and the proof is sent to the client for last approval and finally shipped to the vendor. The client must sign off on the material/design before printing. If the client or the creative agency makes any changes, whether big or small, a change order is created and materials are corrected if required. If the creative agency is going to incur further cost, the client is made aware of and approved by the client. Many of the times, an order is given for at least hundreds of posters, or corporate cards, it is crucial samples are made and circulated within the agency for review (dimensions, colors etc) before the material is shipped to the client.

5.3 The search for an IT solution

The company had rapidly increased operations in a span of one year. The growing number of clients in various segments called for a solution in information technology, a solution that could track every email, interaction and campaign to provide with real time insight into the relationship and work process between the account executive and the client. A well managed CRM was needed that will track every business partner. A meeting with the senior management was held, which led to the conclusion the use of IT in CRM would help the company in maximizing revenue in a very cost effective manner.

Simply choosing a package to automate sales, marketing and support does not guarantee success. While selecting a product may seem like the most important part of the implementation cycle, it is only one piece of the complete cycle that will ensure expected return on investment (Dascalos). The objectives of a successful CRM implementation should be:

1) Your selected CRM system should be a framework for all areas of client relations
2) A record and report on all activities related to your client
3) Analysis tool and reports for forecasting
4) Ability to predict areas of success or failure

5.4 Impetus for CRM

The motivation for selecting CRM in the company was to overcome a creative's biggest challenge; client management. Organizing information and connectivity with the client was the top challenge for the account executive and creative's of the company. CRM systems use IT to track ways in which the agency will connect with their clients, and evaluate these interactions to maximize the lifetime value and satisfaction of the client. The company does not have a very vast client base, but the value of business from each customer is very high. In this highly competitive market, with hundreds of freelancers available, if the agency wishes to preserve and build a loyal client base, they must nurture a transparent and productive relationship which depends on the CRM that is to be used.

5.5 The CRM implementation process

5.5.1 Selection

Since there were no previous ERP or CRM systems in the company, the system was chosen which seemed the most convenient and relevant to the operation processes in the agency. Before the implementation of a CRM system designed specifically for agencies, the firm used Gmail and Whatsapp to stay in touch with clients and Trello for internal communication and managing work routine. Trello is free with a simple interface. Creating and assigning tasks is relatively simple with fast real time updates. The issues were immense; there is no report generation, no calendar, very limited email integration and no sales management feature. There was also a desperate need to understand what the agency does to move deals forward and keep clients coming back with more projects while others stagnate. For that purpose the plan to implement a CRM system designed to assist agencies was implemented.

An unknown but highly recommended system, Base, was chosen because it was economical, easy user interface and the modules very well catered to the marketing, sales and service need of the agency. The CRM software could also be easily aligned with the business processes of the firm.

5.5.4 Implementation

CRM implementation starts with the strategic decision to improve agency business processes. The most important success factor, top management support, was present. It was the duty of the account executives and the project managers to know the clients, understand their demands, identify problem areas, strengths and weaknesses inside the organization, and possess the ability to impose them. (Franka Piskar, 2009)

ID	Task name	Description	Days
1)	Analysis and strategy		
2)	Strategy	Determine your business strategy	5
3)	Evaluation	Perform Evaluation	2
4)	Review	Document business requirements/select CRM	4
5)	Implementation		
6)	Infrastructure	Determine infrastructure requirements	3
7)	Implementation	Implementation of new CRM system	6
8)	Training	Provide proper training	15

Table 1 CRM Implementation timeline

The implementation process involved first reviewing the resource requirements and availability in terms software. Goals and objectives were clearly defined before the implementation process. The main questions that needed to be answered were:

1) Why is there a need to implement the software
2) What are the most significant phases in the implementation process
3) Where will the system save time and effort on client related tasks
4) What are the tasks that need to be automated

Once these questions were answered, there was a structure that was ready to analyze the effectiveness of the selected CRM that will manage prospects and clients, creating a true customer centric firm. During the evaluation phase an outline was created of the firm's business processes, data sources, collateral material etc used in the existing process.

Since, the system is relatively simple; the implementation was done using in-house resources. Training manuals user guides and open communication with the developers of Base CRM were the sources for training for the employees. The system implementation was done using the big bang approach, to make monetary evaluation of the system easier. An audit and review will be undertaken to establish the monetary and non-monetary benefits against the system implementation and training costs.

5.5.2 Outcome

The platform covers multiple areas from tracking leads, sales/client management, email intelligence, to sales reporting and analytics. Base was implemented to gain integrated information from the marketing department to provide input into the system and create analytical reports to make better business decisions e.g. to understand and quantify the sales results of specific leads. Base CRM can track the status of a lead throughout the marketing lifecycle. The new application can create a fully customized sales pipeline. Figure below shows the basic sales pipeline chart which can later be customized to best fit the way of the agency.

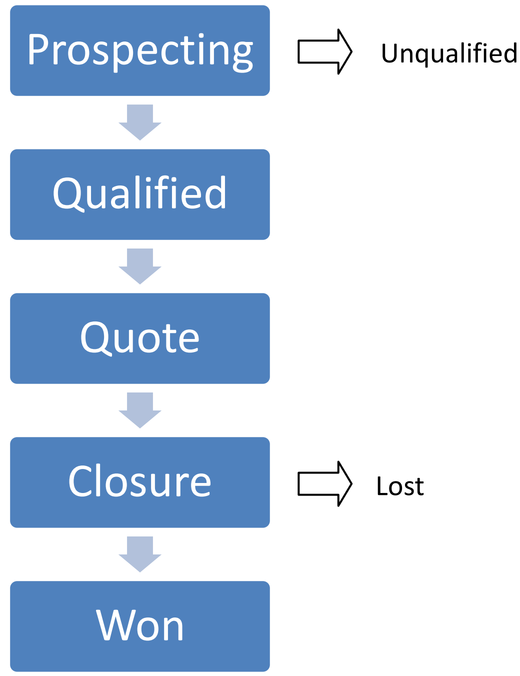

Figure 2 Basic sales pipeline

A new lead is placed into the first step of the pipeline. The account executive evaluates this lead and checked if the account fits the company's overall strategy of increasing revenue and profitability by selling their solution. When the lead is qualified, the lead is forwarded to the next stage in the sales process, the qualified stage. The proposal and the quote are prepared and sent to the prospect, the lead then moves to the last active stage, closure. This stage is where the final details are sorted out and negotiation takes place in a meeting. After the closure, the agency either wins or loses the deal.

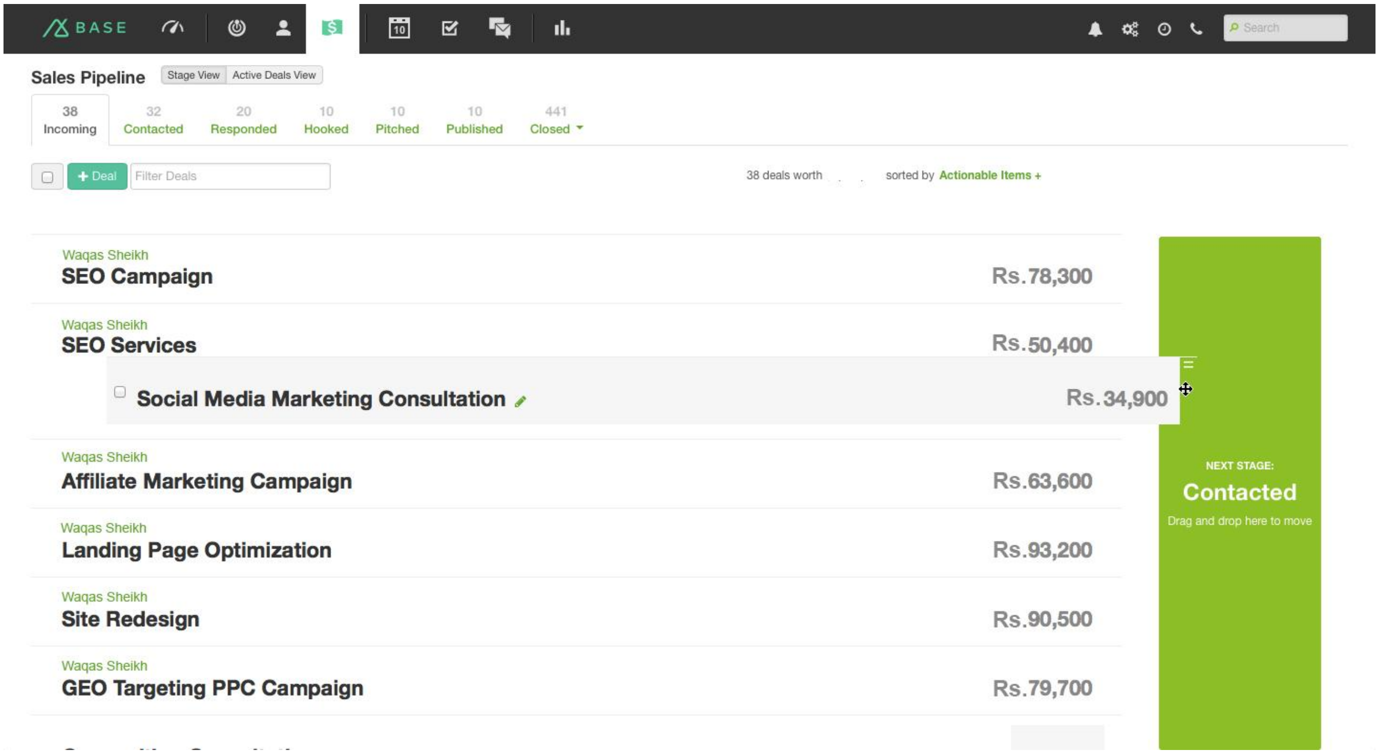

Figure 3 Base CRM screenshot

Base CRM tracks prospects. The account executive entered the entire network into the management system as leads, which includes people the accounts have met in any context. Account executives can also tag leads with custom fields, example, ‘videography’ will denote all clients and leads who regularly need videography and ad-film services. These tags also help in recalling critical information and efficient browsing. Attaching a tag to contacts now helps the executive in identifying existing connection in any field, e.g videography. Contacts can be searched using location as well, which is very important for an agency, especially during trade shows and organizing events across the country. Base helps pull up all the contacts in that specific location and use the job as an opportunity to check in, inform all clients and contacts about the event. Once the relationship is built leads are converted to contacts, contacts are leads that succeed to become definite business prospects.

Figure 4 Base CRM screenshot

Contact organization is an imperative for contract execution. Since each contact represents a future opportunity, and each professional makes career transitions and switches jobs, Base CRM system connects contact cards to LinkedIn, Facebook, and Twitter profiles. The accounts can now stay in touch with the clients even when their emails, titles, and location change. The agency also works with various subcontractors who are needed on short notice, mainly animators. Base CRM system makes it simpler to pull out information of the contact when in need of assistance, it also allows the user to link the contact with the deals he has hired the subcontractor to help him with in his database. Since contact management is the first step for an agency to build strong relationships with the client, Base CRM system has made data entry straight forward and lets the account executive focus on the people and the deal at hand.

The pipeline management feature in Base CRM system assists in keeping all documents and contacts associated with one deal in one central location. A lot of the times hours are spent looking for one attachment in email threads. The account executive or the user of the system can review all related documents while putting together a new bid for upcoming work or any other task. Base has an additional feature which helps the user in remembering to follow outstanding bids and related tasks, a staff member can be assigned to the task as well with an assigned due date. The staff member assigned with the task will receive a reminder in their dashboard and their email to contact the clients at the given time, making client follow ups far more efficient and easy.

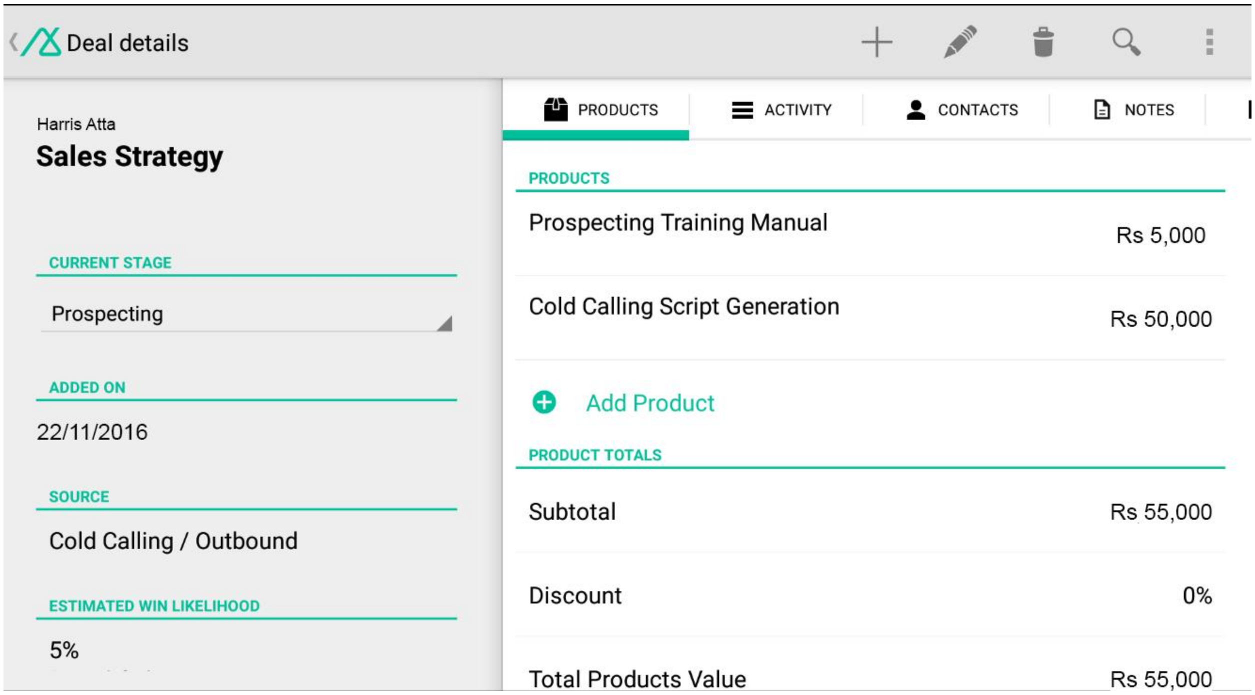

Figure 5 Base CRM screenshot

Like every CRM system, Base generates a comprehensive report specifically designed for agencies. One of these reports includes the Deal Lost Reason report. It is an imperative for an agency to know why they lost a client and to keep a track of how to improve areas of workflow that maybe hindering success. Base offers valuable insight into the performance of the team members improving workflow and locking projects.

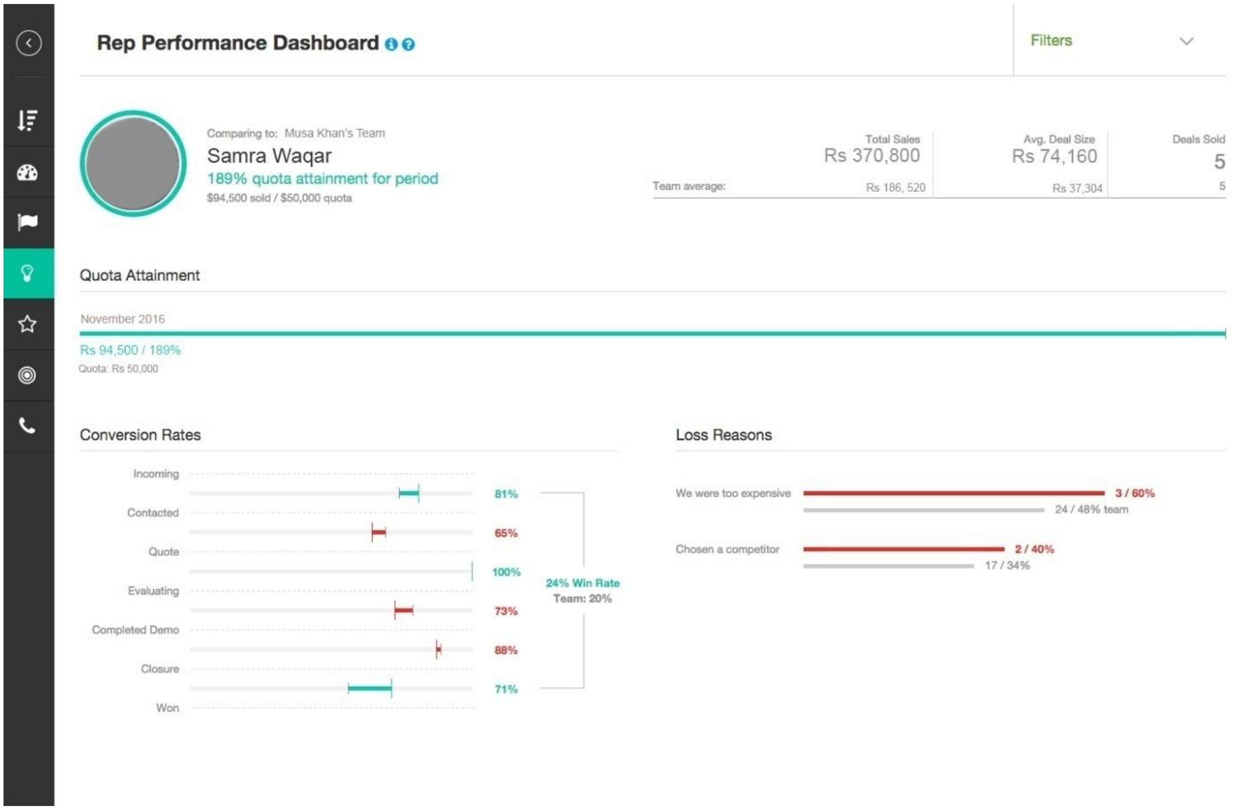

Figure 6 Base CRM screenshot of rep performance

Account executives and managers need quick tools at their fingertips. They can meet with clients either at their offices, but there is also the need for accessing these tools from outdoor photo shoots, design studios and various locations. For this purpose the team members assigned to a project can use Base CRM mobile app on a platform of their choice. The mobile application has strong sync features as well. In an agency, employees from various departments work on one project, photographer, videographer, social media specialist and the account executive handling the account. There is a significant need for all the members working on the project to have the most recent data and details at any time. Effective and efficient collaboration is a necessity.

Majority working hours of an account executive are spent on phone calls with clients. Contracts take minimum a dozen phone calls to land. Even the clients the agency is already working for need constant phone calls to manage. Since rarely do clients fill out briefs and deliver job details over the phone. Base has a voice call feature which enables the account executive to call the client directly from the CRM tool and record calls for review and assessment. Through this feature, the account executive can get an accurate estimate of how much time was spent talking to each client. Base CRM generates a report on calling activity using integrated calling features. From the number of calls to the volume of call against the value of deal is recorded. This data is used to set rates and improve accuracy of billable hours once the client is in client. Having this data of the client at the employee's fingertips ensures client satisfaction.

Employees at a creative agency needed a solution that combined intuitive use with serious power. The best way for team members at an agency to function is by knowing how to find what they need, and that is exactly what Base CRM system does. Base does not bring down creativity providing complicated menu's that need extensive training. Base also comes with a full suite of professional programs, the account executive is not only using the CRM system but also the tools integrated with it. It can be combined with many programs for email, sharing documents, and other crucial business tasks to keep all of the agency's employees productive and dynamic.

5.5.3 Design

The gap analysis was carried out since the Managing Partner wanted a successful implementation of the system with regard to a technical implementation, where the sales and marketing process was mapped. The CRM now shows the cradle to the grave steps of the process.

5.5.5 Impact

The system was simple software that required minimum customization. The key users involved in the decision were the managing partners and the account executives that directly interact with the clients on a daily basis. The implementation was received well by all employees. With the implementation top management believes some of the business processes need to be modified. Key performance indicators, roles and responsibility need to be clear and documented.

Management has planned an audit and review for the end of the year to find out the level of success of the implementation of the new CRM. Besides judging the effectiveness of the new CRM the audit will also provide a baseline for future reference and serve as a performance monitor for the account executives. Management is looking forward to measure the monetary and non monetary benefits of the new CRM. A suggestion has been made to use the balanced scoreboard approach. The balanced scoreboard approach is developed around four different perspectives: financial; customer; internal business processes; and innovation, learning and growth. This method measures quantitative and qualitative outcomes.

Discussion

The case study draws attention to the similarities between the literature and the actual practice of implementing the CRM system. Many marketing agencies in Pakistan do not use CRM and use email and messaging applications to stay in touch with clients and excel sheets to monitor employee work performance. For this reason the decision taken to implement the CRM system was a timely and good one. Before the implementation of the CRM there was no centralized database for all the clients. It was difficult to capture data and input from clients such as, phone calls, emails, and documents in one central source. There was no way to measure wins or losses of contracts and a way to pinpoint specific areas that could be enhanced. There was a growing need to track leads, deals and contracts. Quotes and invoices were disorganized. Internal documents and media files, such as drafts, mockups, designs, ad copies, voiceover samples, photo shoot albums were regularly misplaced. The previous softwares the company was using were not capable of tracking internal work flows as well. Since the agency has dozens of daily tasks, account executives have to make phone calls, accountants have to generate invoices, designers have to make mockups and social media posts, videographers need to make animated videos/ads etc there was a need of a system that could track the internal work flow and monitor progress on projects, develop checklists, time tracking features, and develop Gantt charts.

A paper suggests one of the important steps before implementing the CRM system is to develop a client-centric culture within the organization. Although this is a part of the pre-implementation plan, it has the greatest ability to expect, manage and control the change that will accompany the implementation of the CRM as a whole. This factor also has the greatest ability to decrease chances of failure and disastrous losses, while increasing chances of success with tremendous benefits. (Khalid Rababah, 2011). The agency had this portion covered from the very beginning, from the account executives to the designers, have created a corporate client service culture that is devoted from top to bottom. The managers at the agency quite well understand that the CRM software is not a replacement for the unique customer focused strategy for acquiring and building relationships with clients, and then long term planning for retaining them. Once the managers at the agency built a customer-focused strategy, they decided among themselves how much CRM technology they actually needed. More does not always mean better. In fact, in our case successful CRM operations was very low-tech. Thought process went behind how the managers could motivate and mobilize the employees. The solution is to find the right balance between the people and your CRM.

The outcome of using the CRM was positive and is likely to change the organizational context in a better manner. We got our results by having an interview with the account executive attached in Appendix 2. There is easy data entry and updating, account executives can easily monitor outcomes of calls, the CRM has the ability to store call scripts and make digital notes and has the most simple yet the most useful feature of notifying the user of upcoming tasks and deadlines.

Then there is the question of how the CRM helps the firm to sell more. The CRM creates powerful reports that spot trends and generate insights. The system has the capability to set sales goals and monitor progress as they are being achieved. It also shows where deals go wrong and where reps are succeeding, the feature also provokes motivation in account executives to perform better because now their performance is being recorded.

Using the CRM has already increased knowledge management capabilities and motivation to share data and information with the clients and within the organization. There was higher employee productivity and client satisfaction, these benefits were mentioned by the account executives that they believed will eventually lead to increased revenues and profitability. Other benefits included streamlined business processes, a closer client management system and increased efficiency in data management. The second most important benefit that comes after client management was improved internal work flow. All information and data is collected and organized and shared among the employees. The CRM’s function is now to enable collaboration and coordination among the account and the creative team.

Conclusion

It has become a critical need to use CRM for customer's satisfaction as well as aligning overall business strategy not only for businesses selling products but also for businesses selling solutions. The implementation was driven by the top management to streamline processes and client management to derive maximum revenue, profitability and productivity. The case study results showed positive experiences with the overall CRM implementation process, correlating with high percentage of success as shown in the literature review. CRM software can assist in increasing customer loyalty in many ways. It can track customer defection and retention levels. It can tell you how satisfied your customers are. But in the end, technology is not the answer. For the success of a CRM implementation, full support from the top management is compulsory; the culture of the organization must be such that it is ready to accept changes.

The implementation of the CRM is just the beginning of the company's reorganization, but the overall success is determined by the organizational and cultural turf. As a future plan we would like to compare various other critical success factors and benchmarks for CRM implementations in advertising and creative agencies. With the help of Base CRM relationships with clients will improve, employees will be better informed and the firm will be able to make better strategic decisions. This is a case from which other firms can learn. It discusses what are the things to consider before and during a CRM implementation and changes are necessary to bring about. It is necessary that the culture of the organization supports change to make the implementation process a success. Further research will be directed towards sustaining improvements and advancing performance.

Appendix 1

Transcription of interview with managing partner of the firm

Maliha: How are you?
Shayan: Very well thank you.

Maliha: Let's start by identifying the reason why your organization is in need of a CRM, the problem areas.
Shayan: First of all, we need a software to track leads. As an agency, it is important that we know how many customers and leads we've generated from our marketing activities. Second, we need a single platform to keep all data organized and constantly updated on cloud, if our hard drives fail we'll face some serious issues. Unorganized data isn't going to make us profits. Manual updating our address books is also a problem, we're gradually growing and need a system to automatically store and retrieve our past and current leads and contacts. Internal workflows also need to be managed through a system.

Maliha: What are your organization's problem areas?
Shayan: One of our top challenges is measuring our return on investment on the marketing activities we do for clients. And the second most challenging task is getting everyone on the same page when it comes to projects. Each project requires personnel from a different department, one from IT, a project manager, designer, photographer etc. Many of the times the root of the problem is simple disconnect in communication between the employees.

Maliha: How much monetary loss your organization is incurring due to related problem areas?
Shayan: It's not that we're making monetary losses because of our current problems; we're actually missing out on greater possibilities. How many leads have we not contacted twice? Presented a new service to a previous client? We're continuously working learning new methods of advertising which need to be presented to clients, past and future prospects.

Maliha: How much opportunity are you losing due to your inefficient CRM process?

Shayan: The lost opportunity is basically us not making use of the historic data. When we lose a client or a lead, what were the reasons? The creative's made for the client need to be in a safe convenient location to be used in portfolios and for showing future clients. The sales pipeline needs to be continuously updated.

Maliha: What are the primary features you feel that is must in your CRM application to overcome the existing losses?

Shayan: As an agency, an important feature to be present in our CRM should be lead generation and tracking. There is little or no follow up with leads, automatic reminders to sales people will be very beneficial. Many of our clients are on social media, as well as the prospects, that is a huge market. We need a CRM that is social media integrated for successful marketing. It is also very distracting to switch between social media channels. Data organization is of the utmost importance. And reports of course, we need robust features for report generation.

Maliha: Thank you for your time, this gives significant insight as to what kind of a CRM the agency needs and the problems you are currently facing due to working without one.

Shayan: You’re welcome, please let me know if you need any further information in the future.

Appendix 2

Maliha: How do you feel about the new CRM system?

Musa: Our new CRM system directly supports our client servicing strategy and mirrors our business model. There was minimum disruption during the implementation phase because of the simple interface; the account executives got a grasp of the function and tools very quickly.

Maliha: What in your opinion are the benefits the organization is receiving from the CRM?

Musa: There are plenty. We've copied our data from 4 hard drives to one central location. Access to files is now more convenient because of cloud storage. Less time is wasted, data is now stored with tags, tags help us in locating a file with respect to the relevant client or the employee. Even during calls with clients, I can quickly retrieve any past information, like a past purchase, a video we shot for them, a creative, etc.

Maliha: Does the CRM help with automating everyday tasks?

Musa: Of course, the CRM has a tasks tab, sends out reminders, reports are generated, everything is automated. This gives the accounts execs and I to focus more on closing leads solving marketing and strategic issues with clients.

Maliha: How does having mobile CRM help you in making processes more efficient?

Musa: we can deal with clients using our phones and tablets now. This is pretty helpful during pitch meetings. We have all the updated information with us; they'll ask us for work samples if we've done similar type of projects in the past. Mobile CRM makes it easy to pull up information in a jiffy using tags assigned to files.

Maliha: Can you clarify with an example?

Musa: Sure, during a meeting with a finance company, one of the members present in the meeting asked if we had done campaigns for restaurants as well, which was not a part of the presentation we had prepared, only recently had I uploaded our previous campaigns on the CRM and assigned 'café' as a tag to it. He liked the campaign and we got the account for the restaurant instead.

Maliha: Why do you think most CRM implementations fail, and yours was successful?

Musa: I believe most CRM's fail because most executives they don't know why they're buying or how to get the most out of their CRM system. We knew what we were buying, how to make use of all the features and make it a part of our client-focused organization that wins client loyalty over a long period of time.

Maliha: Thank you

Musa: Any time, I’d be happy to help for future research.

Bibliography

Alok Mishra, D. M. (2009). Customer Relationship Management: Implementation Process Perspective. *Acta Polytechnica Hungarica* , 17.

Alyson, J. (n.d.). *Role of Client Service Managers in an Advertising Agency*. Retrieved from www.chron.com.

Darrell K. Rigby, F. F. (2006). Avoid the four perils of CRM . *Harvard Business Review* .

Darrell K. Rigby, F. F. (2000). Avoid the four perils of CRM. *Harvard Business Review* , 9.

Dascalos, P. M. (n.d.). *SEVEN CRITICAL STEPS TO A SUCCESSFUL CRM SOLUTION.* Retrieved from www.crmodyssey.com: http://www.crmodyssey.com/Documentation/Documentation_PDF/Seven_Critical_Steps_to_a_Successful_CRM_Solution.pdf

English, M. (2015, December 16). *CRM and marketing agencies-The perfect pairing*. Retrieved November 2016, from www.bullhorn.com: http://www.bullhorn.com/blog/2015/12/crm-for-marketing-agencies-perfect-pairing/

Franka Piskar, A. F. (2009). A Successful CRM Implementation Project in a Service Company: Case Study. *Organizacija* , 10.

Kenneth C. Laudon, J. P. *Management Information Systems.*

Pullen, B. (2013, 5 3). *Defining a creative agency*. Retrieved 10 11, 2016, from playgroundinc: www.playgroundinc.com

Steinmetz, J. H. (2013, 8 29). *Growth University*. Retrieved 11 2016, from FutureSimple: https://www.futuresimple.com/blog/how-creative-agencies-can-grow-their-business-with-crm/

Techvalidate. (2016, July). *How CRM helps advertising and media agencieis succeed* . Retrieved October 2016, from TechValidate: https://www.insightly.com/wp-content/uploads/2016/07/Advertising-Media-ebook-July-2016.pdf

Zineldin, M. (n.d.). The royalty of loyalty: CRM, quality and retention. *Journal of Consumer Marketing* , pp.430 - 437.