Creating an effective CRM based organization

Gino Giovannelli
VP e-Business Solutions
Relationship Management & Development
Carlson Companies
Carlson Companies

Hotels

Restaurants

Cruises

Travel

Marketing
Agenda

• What is CRM
  • Identifying CRM opportunities
  • Break
  • Organizational strategies for CRM
  • Open microphone
CRM stands for...

Customer Relationship Management

Costs Rapidly Multiplying
CRM.. A different way to compete

Based on Peppers & Rogers Group methodology
What is CRM

• What it is not…
  – A department name
  – Just a marketing strategy
  – An application
  – A database
  – A technology platform
  – Series of random acts of CRM
  – Better targeted harassment

• What it is…
  – An organizational strategy of leveraging customer insight to:
    1) Grow highest value clients
    2) Increase customer base

Discussion point: How can you have a relationship with someone you don’t know?

Based on Peppers & Rogers Group methodology
Misconceptions of CRM

1. CRM is based on historical customer data and therefore cannot be applied to prospects

   • Reality: CRM is based *growing* relationships, but does not require an *existing* relationship
     – Relationships can be 5 years old or 5 minutes
     – What customers are doing today can be as important as what they did in the past
     – Example: Radisson.com (profile info vs real time behavior)
• Historical profile attributes
  – Room preferences
    • Smoking/ Non smoking
    • Bed type
  – Activities
    • Shopping
    • Romance
    • Golf
    • Theater
  – Favorite cities
  – Favorite hotels

• Real time behavior attributes
  – What site was visited prior
    • Destination
    • Activity
  – What they do while on the site
    • Site sections
    • Cities researched
    • Hotels researched
    • Activities researched
Misconceptions of CRM

• Better name is Customer Insight Management
  – Insights are based a combination of:
    • Historical information
      – For existing customers
    • Real time information
      – For existing customers and prospects
  – Insights tell you what customers want regardless of whether you have an existing relationship with them

• Result: CRM can be applied to gaining new customers as well as maximizing your most valued customers
CRM can be applied in to most valued customers as well prospects

Based on Peppers & Rogers Group methodology
Misconceptions of CRM

2. CRM is only for Customers

• Reality: CRM can and should be applied to:
  – Business partners (B2B)
  – Employees (B2E)

  – Why wouldn’t you treat your most valued business partners and employees in a way that matches their needs

  – Hold this thought for our open mike discussion
Agenda

- What is CRM…
- Identifying CRM opportunities
- Break
- Organizational strategies for CRM
- Break
- Open microphone
Identifying CRM Opportunities

- Existing customers
- Prospects
CRM Opportunities for existing customers

1. **Identify** customers preferences and behaviors

2. **Differentiate** them by value

3. **Interact** with them more cost-efficiently and effectively

4. **Customize** some aspect of the enterprise’s behavior

Based on Peppers & Rogers Group methodology
Capture relevant & usable customer information
- Communication preferences (phone, web, email)
- Customer interests (likes and dislikes)
- Buying patterns (how often they buy)
- What do they buy (product level and price point)

Share that information across touch points

Get your database right

The customer database is your single biggest asset in achieving the ultimate customer experience
Differentiate by value:

- Profit from sales within and across the enterprise
- Likelihood of volume growth or increased profits
- Predictors of loyalty or attrition
- Profit from referrals to other customers
- Others….discussion??

Group customers into groups

- Most valued customers (MVC’s)
- Most growable customers (MGC’s)
- Low potential customers (LP’s)

Based on Peppers & Rogers Group methodology
Tiering Customers

Based on Peppers & Rogers Group methodology
• Promote dialogue with targeted customer groups based on their communication preference
  – Phone
  – Email
  – Website
  – Newsletters

• Capture the dialogue
  – Store it in company databases
  – Make it available to all channels
  – Empower them with tools to be efficient
  – Never ask the same question twice (hotel check-in)

Based on Peppers & Rogers Group methodology
• Reward customers for sharing their preferences by offering the most relevant
  – Products
  – Services
  – Messages

• Customization provides the payoff for previous “IDIC” investments and activities
  – Creates relevance
  – Deepens customer relationships

Based on Peppers & Rogers Group methodology
Existing customer example:
Travel Agent Hurdle program (B2B)
1. **Identify** travel agent preferences and behaviors
   - Communication preferences
   - Booking volume per month
   - What they sell and at what rates

Based on Peppers & Rogers Group methodology
2. **Differentiate** them by value

- Total bookings and revenue per year
- Margin per transaction
- Potential to grow value (age, years in the business)

- Categorize agents by booking activity
  - Top tier agents
  - High growth
  - Inactives

- **Hold out control groups on each category**

Based on Peppers & Rogers Group methodology
3. **Interact** with them more cost-efficiently and effectively

- Communicated the launch of the hurdle program to agents based on their preferences (email, newsletter, etc.)
- Utilized event based communication (EBC) when agents reach program milestones

Based on Peppers & Rogers Group methodology
4. **Customize** the promotion for each group of travel agents

- Different hurdles were set for each group
  - Top performers:
    - Average 10 bookings/month
    - Hurdle set at 15 bookings/month
  - High Growth:
    - Average 7 bookings/month
    - Hurdle set at 10 bookings/month
  - Low Performers: 1 booking per month
    - Average 3 bookings/month
    - Hurdle set at 5 bookings/month

Based on Peppers & Rogers Group methodology
Results

• Hurdle Promotion, 3 month program
  – Booking volume by agencies in the test outperformed booking volume by agencies in the control by 26.3%.
  – Incremental revenue was $1.8 million for the 3 month subsequent period against a bonus cost of $134,474.
Hurdle Promotion Results

Promotion Incrementality: 126%
Identifying CRM Opportunities

- Existing customers
- Prospects
CRM Opportunities for prospects

1. **Identify** customers preferences and behaviors

2. **Differentiate** them by value

3. **Interact** with them more cost-efficiently and effectively

4. **Customize** some aspect of the enterprise’s behavior

Based on Peppers & Rogers Group methodology
Prospects example:
Radisson.com visitors (B2C)
1. **Identify prospects based on preferences and behaviors**

   - What site they came from prior to visiting Radisson.com
   - What sections of the site they visiting:
     - Radisson Gold Rewards
     - Destination and Activities section
     - Business travel section
   - Which cities and hotels are they researching

Based on Peppers & Rogers Group methodology
3. **Interact** with them more cost-efficiently and effectively

- Customized offers and messages are created in a Content Manager application
  - No programming resources required (less costly)
  - Can be launched immediately (time to market)

Based on Peppers & Rogers Group methodology
Welcome to radisson.com: Please sign in

Make Reservation

Enter City Name

Select a State/Province (optional)

Select a Country (optional)

Check-in Date: 30 Jan 2004

Check-out Date: 31 Jan 2004

Number of Guests: Adults Children

Search for Special Rates (optional)

change/cancel continue

Find a Hotel

Sign in to access Your Account

STAY RELAXED

RADISSON VACATION PACKAGES

LET US MAKE IT EASY WITH PACKAGES INCLUDING AIR, CAR, HOTEL & EVENTS.

Vacation Packages
Let's make it easy with Air, Car and Hotel Packages.

Trip Planner
4. **Customize** the offers and messages
   - Offers and messages are matched up with visitor needs and made relevant and pushed out to visitors based on the following business rules:
     - Referring URL
     - Feeder Markets
     - Sections visited
     - Requested cities
     - Requested hotels

Based on Peppers & Rogers Group methodology
Create New Rule

Choose New Type To Create...
- Always Display Rule
- Hotel Driven Rule
- Location Driven Rule
- Click-Stream Driven Rule
- Referral Driven Rule
- Profile Driven Rule: Favorite Destinations
- Profile Driven Rule: Favorite Hotels
- Profile Driven Rule: Brand Specific Attributes
- Key Account Driven Rule
- Feeder Market Driven Rule

Schedule

- Launch Immediately
- Scheduled Launch
- Never Expire
- Expire 16

Actions

Back to Promotion List  Printable Page  Save  Submit  Save As New Promotion  Delete Promotion
Radisson Hotel Boston

Links and Locations

Stuart Street Playhouse virtual tour
Public Gardens virtual tour
Cheers Bar virtual tour
Faneuil Hall virtual tour
Harvard University virtual tour

When you do decide to venture outside of the hotel you'll find that we are centrally located in the most thrilling part of downtown Boston. We are in the cultural heart of the vibrant Theatre District, only one block from the Boston Common.

The Radisson is also within walking distance of many...
Create New Rule

Choose New Type To Create...

- Location Driven Rule
- Always Display Rule
- Hotel Driven Rule
- Click-Stream Driven Rule
- Referral Driven Rule
- Profile Driven Rule: Favorite Destinations
- Profile Driven Rule: Favorite Hotels
- Profile Driven Rule: Brand Specific Attributes
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- Feeder Market Driven Rule

Schedule

- Launch Immediately
- Scheduled Launch
- Never Expire
- Expire

Actions

- Back to Promotion List
- Printable Page
- Save
- Submit
- Save As New Promotion
- Delete Promotion
Hotel Directory: Minneapolis, Minnesota

The following hotels match your search:

1. Radisson Plaza Hotel Minneapolis
   - 35 SOUTH SEVENTH STREET MINNEAPOLIS, MN 55402
   - (612) 339-4900
   - IN THE HEART OF THE MINNEAPOLIS UPSCALE BUSINESS DISTRICT
   - Pets Allowed, Suites, Health Club

2. Radisson Hotel Metrodome
   - 615 WASHINGTON AVE SOUTHEAST MINNEAPOLIS, MN 55414

Reservation Information
- Minneapolis
- Minnesota
- United States
- Check-in: Fri 17 May 2002
- Check-out: Sat 18 May 2002
- 1 Adult
- 0 Children

What is a Sniggle??
Go Giggle with a Sniggle at the Radisson South in Minneapolis
Radisson Go Packages

Terrific rates, full breakfast for two and a Go Pack filled with surprises.

Imagine a weekend away. Sleeping in. A hearty breakfast. Cold drinks, and a warm afternoon in the sun. Play a round of golf, shop and grab a treat from your Go Pack. Then have a romantic dinner by the pool of course. Why not? It’s your weekend and we’re here to do whatever it takes to make it special. Guaranteed.

Radisson. The genuine choice of the Go Generation℠.

Terms and Conditions
Oneida Bingo & Casino - Microsoft Internet Explorer provided by Carlson Companies, Inc.

Address: http://www.oneidabingoandcasino.net/

Good Morning - Tuesday, January 15, 2002

Now There's Entertainment!

Rockin' 50's Fest - Free Event!

Celebrate Oneida Casino's 8th Anniversary by attending the World's Largest Show of Rockabilly Stars!

July 7-13, 2002
Enter Oneida Bingo and Casino's World Wide Website!
Radisson Hotel & Conference Center Green Bay

Take a virtual tour

Comfort, first-class service and good times await you at the grand Radisson Hotel & Conference Center Green Bay. Connected to the 88,000 sq. ft. Oneida Bingo & Casino and directly across from Austin Straubel International Airport, the Radisson offers complimentary shuttle 24-hours a day.

Recipient of the coveted Radisson President's Award for Outstanding Service, our Staff is dedicated to serving you.

And, we're growing in all the RIGHT places! With a 24 million dollar expansion in progress we will be ready to welcome you to our new Three Clans Ballroom and 115-room tower addition beginning June 2002, which will total 414 guestrooms and 30,000 square feet of meeting space.
Florida Residents Save!

The Radisson Hotel Orlando offers Florida Residents Special Rates

Florida residents work hard and play hard. That’s why we offer you some of the best rates around. Take advantage of area Florida Resident specials and stay at Orlando’s premier attraction hotel, The Radisson Hotel Orlando AT THE ENTRANCE TO UNIVERSAL ORLANDO.

Terms & Conditions

Orlando, FL, United States
Radisson Hotel Universal Orlando
FLORIDA RESIDENT RATE

Orlando, FL, United States
Radisson Hotel Universal Orlando
FLORIDA RESIDENT RATE-EXEC RM

RESERVE

RESERVE
<table>
<thead>
<tr>
<th>Profile Driven Rule: Favorite Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Driven Rule: Favorite Hotels</td>
</tr>
<tr>
<td>Profile Driven Rule: Brand Specific Attributes</td>
</tr>
</tbody>
</table>

**Schedule**

- Launch Immediately
- Scheduled Launch
- Expire 16
<table>
<thead>
<tr>
<th>What do you like to do when you travel? What activities and attractions interest you? (Select all that apply.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Amusement Parks           ☑ Beach Waterfront               ☑ Family</td>
</tr>
<tr>
<td>☐ Gambling                   ☑ Golf                                ☐ Holiday</td>
</tr>
<tr>
<td>☑ Romantic                   ☐ Shopping                            ☐ Skiing</td>
</tr>
<tr>
<td>☐ Sporting Activities        ☐ Theatres, Concerts, Museums       ☑ Tours-Sightseeing, Historic</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I typically use the following hotel services when available. (Select all that apply.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities:</td>
</tr>
<tr>
<td>☐ Golf                              ☑ Health Club</td>
</tr>
<tr>
<td>☐ Swimming Pool                     ☐ Tennis</td>
</tr>
<tr>
<td>☐ Whirlpool/Sauna</td>
</tr>
<tr>
<td>Restaurant Services:</td>
</tr>
<tr>
<td>☐ Bar/Lounge                         ☐ Restaurant</td>
</tr>
<tr>
<td>☐ Room Service</td>
</tr>
<tr>
<td>Business Services:</td>
</tr>
<tr>
<td>☑ Business Center (fax/copying)      ☐ Business Class Room</td>
</tr>
<tr>
<td>☐ Dataport                           ☑ High Speed Internet</td>
</tr>
<tr>
<td>☐ Videoconferencing</td>
</tr>
<tr>
<td>Transportation Services:</td>
</tr>
<tr>
<td>☐ From Airport                       ☐ Valet Parking</td>
</tr>
<tr>
<td>Other Hotel Services:</td>
</tr>
<tr>
<td>☐ Dry Cleaning/Laundry               ☐ Gift Shop</td>
</tr>
<tr>
<td>☐ In-Room Movie                      ☐ Upgrade to Suite/Private Floor</td>
</tr>
</tbody>
</table>

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**Business Travel**

Please answer the following questions about your Business travel preferences.

**Within the United States, the states I would most like to visit on a Business Trip are:**
My Recurring Trips
Disney Trip
✓ RESERVE
✓ DELETE
Trip to Corporate
✓ RESERVE
✓ DELETE

My Reservations
To change, cancel or designate a reservation as a recurring trip, please select from the list below.

Radisson Plaza Hotel Inner Harbor Baltimore
Baltimore, MD, US
Wed 17 Jul 2002 - Fri 19 Jul 2002
Confirmation Number: 8YMVDPG

My E-scapes
Your personal vacation packages, customized to your travel preferences:

Go Golfing in the Texas Hill Country
The Radisson Resort Hill Country in San Antonio will fit you to a tee!

Looking for a romantic getaway?
The Radisson Riverfront Hotel is offering luxurious Whirlpool Suites at a discounted rate on Fridays

ASiRA Spa Retreat in San Antonio
Relax, unwind and pamper yourself at our exclusive spa and health club!

My Favorite Hotels
Make a reservation or access information about your favorite hotels.
### Promotion Rules

<table>
<thead>
<tr>
<th>Rule Type</th>
<th>Section:Page</th>
<th>Priority</th>
<th>Rule Criteria</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRUISE CODE</td>
<td>Voyage:VoyageSearchResult, Voyage:VoyageDetail</td>
<td>3</td>
<td>Cruise Code = VOY040723</td>
<td>Edit</td>
</tr>
<tr>
<td>SPECIALOFFER</td>
<td>Specials:SpecialsHome</td>
<td>3</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>FAVDESTIN</td>
<td>MyCruises:MyCruisesHome</td>
<td>3</td>
<td>Favorite Region = ALASKA</td>
<td>Edit</td>
</tr>
<tr>
<td>FAVSHIP</td>
<td>MyCruises:MyCruisesHome</td>
<td>3</td>
<td>Favorite Ship = VOY</td>
<td>Edit</td>
</tr>
<tr>
<td>LOCATION</td>
<td>Ships:Ship</td>
<td>3</td>
<td>Ship = VOY</td>
<td>Edit</td>
</tr>
</tbody>
</table>

#### Create New Rule

Choose New Type To Create...  [Create Rule]

#### Copy Rules from Existing Promotion

Existing Promotion Offer

ID:  [Copy Rules]

#### Move Promotion to Different Section

Choose New Section...  [Move Promotion]
My Cruises

Welcome, Gino Giovannelli. Sign Out

My Cruises is your personal page where you can:

- Create a "wish list" of cruises you're considering.
- Find special offers that match your travel preferences.
- Manage your account and more.

My Saved Cruises

San Juan to San Juan on Radisson Diamond
- San Juan to San Juan
- 5 Nights
- Departs February 13, 2004
- Starting at $1,398 - Single voyage 2 for 1

Delete selected cruises

Cruise Questions?

Planning Your Trip
Air Transportation
Business Services
General Reservations Questions
More Cruise Questions

My Favorite Ships

Edit Ships
My Favorite Ships

- Seven Seas Voyager
- Seven Seas Navigator

The following special offers match your ship preferences.

New England & Canada - Extended Early Booking Savings
Enjoy a brilliant palette of russet and gold in Canada and New England aboard the Seven Seas Navigator.

Mediterranean - Free Deluxe Hotel Stay Plus Savings
Mediterranean & Greek Isles Odysseys aboard Seven Seas Voyager.

Europe - Business Class And One Category Upgrades
Sail from Stockholm to Rouen aboard the Seven Seas Voyager.

My Favorite Destinations

- Alaska
- Caribbean

The following special offers match your destination preferences.

Alaska - 50% Off Second Guest
Agenda

- What is CRM
- Identifying CRM opportunities
- Break
- **Organizational strategies for CRM**
- Open microphone
Organizational Strategies to implement effective CRM

• Three aspects of your organizational strategy:
  – Staffing component
  – Business strategy component
  – Enabling technology component

• Requires a migration strategy
Migration Strategy

3 Phases

1. "Islands of CRM"
2. Customer Relationship Management team
3. Relationship Management & Development team
Phase 1: “Islands of CRM”

- Pre 2001
- Each division doing its own CRM activities
  - Easy to do…
  - Limited in payoff because it was limited to a single division
- No leverage of:
  - Resources
  - Applications
  - Technology platform
  - Customer information from other divisions
Migration Strategy

3 Phases

1. “Islands of CRM”

2. Customer Relationship Management team

3. Relationship Management & Development team
Phase 2: CRM Team

• Established: Fall 2001
• Roles
  – Primary: Enable CRM within divisions
  – Secondary: Enable CRM across divisions
• Functional areas:
  – Loyalty Marketing (customers and intermediaries)
  – Communications (direct and email)
  – E-Business
  – Analytics
Phase 2: CRM Team

- Jurisdiction:
  - Carlson Consumer Group
    - Hotel division
    - Restaurants division
    - Cruise division
Phase 2: CRM Team

• Approach:
  – “100 small wins”

• Technology investment:
  – Minimal
  – Leveraged existing divisional technical platform

• Goal
  1) Develop customer relationship within and across
  2) Accomplish “100 small wins”
  3) Communicate those wins to educate the business on the value of CRM
“100 Small Wins”

Examples:

1. Extend our online campaign management system (ROI Direct) for our Hotel’s division to our Cruise division
Welcome
Welcome to Radisson ROI Direct. Here’s your opportunity to increase revenue by initiating highly targeted direct marketing campaigns that address your specific marketing objectives. With just a few easy steps, you will query a list of guests or members that meet a specific profile. You’ll select an appropriate creative format, with a customized message and offer. And with a click, it’s in the mail.

Radisson ROI Direct puts the power of database marketing at your fingertips.

If you have not signed up, click here. For additional information, select the “ABOUT” button above. If you have questions, or if you’ve forgotten your password, call your Radisson ROI Direct representative at 1-888-333-8019.

Login
User ID: [hidden]
Password: [hidden]
1. Marketing Objective

Each property has its own marketing needs at different times of the year, so the first step in your campaign is to determine what you want to accomplish. This should be easy, as you probably already know when you want to increase occupancy, and which guests/members you need to reach. Simply choose from the targeted list below to meet your business need.

- Weekday Business
- Midweek Business
- Shoulder Business
- Extended Stay
- Repeat Guests
- Weekend Leisure
- Repeat Members
- Increase Revenue Per Night
- Lapsed Members
- Increase ADR
- New Members
3. Define Your Audience

From within the database previously selected, define a specific audience for your campaign from one of the options listed below. The system will calculate the pool of qualified guests/members available for your marketing campaign.

- Weekend Couple Getaway
- Weekend Family Getaway
- Weekend Getaway
- WHP - Members within specific Corporate accounts

Please note, for the WHP selection above you will be asked to enter the WHP numbers you want to query on the next screen. Specific corporate account numbers can be found by referencing the E13 Curtis-C report.
5. Customize Your Promotion

Based on the database and audience you've chosen, there are 1,984 guests/members that best match with your business needs. From that list, specify the number of customers you would like to mail to. Next, specify the date range you want your promotion to run, and your special offer. Finally, confirm the description you want to use for your property. Once you have made your choices, click on the “finished product” button.

**Quantity:**
If you would like to narrow the audience even further, choose the number of guests/members you would like to mail your campaign to, in intervals of 1,000 down to 500. Your final mail quantity may be lower due to periodic data updates.

- **Quantity:** 1,984

**Promotion Dates:**
Select a date range for your promotion

- **Promotion Dates:** 05/01/2001 - 05/30/2001

**Points Offer:**
Select a points offer for your promotion

- **Points Offer:** 1000

**Descriptive Property Copy:**
You can customize this description if you desire. If you choose to change anything, please proof your changes carefully. This description was developed for you from the available information on radisson.com. You can leave this information as is or customize with special amenities for the audience you are targeting or special...
ROI Direct Results

• Radisson Results
  – 553 Radisson users (296 active hotels)
  – Average of 24 campaigns per month
  – 7:1 average incremental payback
“100 Small Wins”

Examples:

2. Extend our web site platform for Hotels division to our Cruise division
Welcome to Park Inn - Park Inn & Plaza Hotels - Microsoft Internet Explorer provided by Carlson Companies

Welcome to Park Inn hotels: Please sign in.

make a reservation

Enter a City Name

Select a State/Province (optional)

Select a Country (optional)

Check-in Date: 17 Jul 2003

Check-out Date: 18 Jul 2003

Number of Guests: Adults Children

Search for Special Rates (optional)

change/cancel

continue

< optional >

Promotional Code

Corporate Account ID

Park Rewards Number

Travel Agent ID

change/cancel

continue

NOW ENTERING: NO STRESS ZONE.

For Worldwide Locations: To explore our locations around the world - click here.
luxury goes exploring™

Plan a Voyage

Spotlight Cruises

Le Cordon Bleu® 2003 Workshop Sailings
Academie D'art Culinaire De Paris 1895 - Le Cordon Bleu aboard Seven Seas Voyager

Spotlight is on ... Antiques
You'll treasure our Fare Deal aboard Radisson Diamond

Destinations
- Caribbean
- Bermuda
- Alaska
- Europe & Mediterranean
- More...
“100 Small Wins”

Examples:

3. IX Match: Modeling tool to predict where past cruisers will want to go in the future based on:
   • Past passenger data
     – General demographic information
     – How much past passengers have spent on cruises
     – Where past passengers have cruised
     – What time of year they have cruised
     – How often they cruise
   • Ship data:
     – Which ships are one time ships vs repeat ships
   • Itinerary data
     – Which itineraries are one time itineraries vs repeat itineraries
Migration Strategy

3 Phases

1. “Islands of CRM”
2. Customer Relationship Management team
3. Relationship Management & Development team
Phase 3: RM&D Team

• Established: Fall 2003
• Roles
  – Primary: Enable CRM across divisions
  – Secondary: Enable CRM within divisions
• Functional areas:
  – Customer Insight
  – Customer Data
  – E-Business Solutions
  – Integrated marketing
• About half of the original CRM team were “re-planted” back into the divisions
Relationship Management & Development (RM&D) Team

Kathy Hollenhorst
Corporate Vice President
Relationship Management & Development
Center of Expertise

Sandy Anderson
CRM Coordinator
Special Projects

Mike Williams
Sr. Director
Integrated Marketing
& Customer Intelligence

Mark Wells
Sr. Analyst
Project Mosaic
Customer Intelligence

Joell Morin
Project Manager
Project Mosaic
Customer Strategy

Ari Chatterjee
Sr. Business Analyst
Customer Data & Valuation

Jeff Heine
Manager, Data & CRM Applications

Gino Giovannelli
Vice President
eBusiness Solutions
Center of Expertise

Jay Matthews
Director
eBusiness Solutions
Phase 3: RM&D Team

- Jurisdiction:
  - All divisions
    - Hotel division
    - Restaurants
    - Cruise division
    - Travel division
    - Marketing division
Phase 3: RM&D Team

• Approach:
  – “3 Big Wins”
    1) Enterprise Data Trust
    2) Enterprise Business Platform
    3) Re-Engineered Marketing organization
Phase 3: RM&D Team

• Technology investment:
  – More significant
  – Teradata (Enterprise Data Trust)
    • Warehouse (infrastructure)
    • Shelves (Storage space)
    • Tools (CRM Applications)

• Goal
  – Create an Enterprise Business Platform
    • B2E
    • B2B
    • B2C
What is the Enterprise Business Platform?

The E-Business Platform is an enterprise-wide offering that will empower customers, business partners and employees with information, insight, and tools to satisfy their needs.
Enterprise Business Platform

- **Benefits:**
  - Accuracy of information due to one source of information (one version of the truth)
  - Transparency of the information (everyone has access to whatever information is needed)
  - Efficiency due to leveraging a common set of processes (including sign on), applications, site navigation, etc
  - Engagement of users because all their needs are addressed through a common GUI in a one stop shop environment
  - A stronger relationship with our employees, business partners and customers because we have empowered an effective and efficient environment
Enterprise Business Platform from 30,000 feet

- B2E
- B2B
- B2C

- e-Portal
- Applications Suite
- Enterprise Data Trust
Enterprise Business Platform

• Why do we need this?
  – B2C example
Thank You Gino GIOVANNELLI

Your profile is now active and ready to go.

With a Radisson.com account, you can take advantage of special offers and express reservations tools that will save you time and money. You also get a personalized start page with customizable links to allow all your favorite services and features. Start personalizing your start page today!

To receive a Radisson Gold Rewards account number, please sign up below.

Sign Up for Special Programs

Sign Up for Gold Rewards

Join Radisson Gold Rewards and you are on your way to enjoying a free night's stay faster as well as other great rewards with any one of our network partners.

If you already have a Gold Rewards number and would like to join Radisson Gold Rewards, please enter your account number.

Gold Rewards Account Number: 

Sign Up for Hot Deals

Looking for incredible deals on last-minute travel? Sign up for Hot Deals to receive email notification of special offers available exclusively to our online customers.

Sign Up for My E-scares
Radisson Gold Rewards®

MODIFY YOUR RADISSON GOLD REWARDS PROFILE


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Enterprise Business Platform

• Why do we need this?
  – B2C example
  – B2E example
LIFE AS WE KNOW IT: A question for our times: Have you forgotten your password?

Wrote Sharon of Roseville: "Today I tried to sign in to the company training menu and kept getting 'Incorrect password or User ID.'"

"I finally used the 'Forgot your User ID or password?' prompt and discovered that I have another User ID that I haven't used before."

"It had taken me half an hour. I realized that I need to come up with a better way of remembering all my passwords than a Post-It Note on my monitor."

"I started writing down all the different applications that have..."
"1. My computer.

"2. Applying for vacation.

"3. Signing up for company classes.

"4. Signing in to Oracle.

"5. Using Office Depot for supply orders.

"6. Ordering packing boxes through Uline.

"7. Accessing my employee 401(k).

"8. Signing in to the copier for copies.


"10. My long-distance calling card for when I am not in the office.

"11. Signing in to my home computer to access my work e-mail.

"12. My voice mail.

"13. The password for the department conference-calling number.

"As I was writing all of these down, I decided to keep going and...
Current employee online tools

- CCI
  - Epicenter
  - Carlson Rewards
  - Carlson University
  - MyHR (PeopleSoft)
  - Centra

- CHW
  - KnowledgeNet
  - Info4you

- CMG
  - KnowledgeBank
  - SalesDriver
  - PRG

- RSSC
  - KnowledgeBase

- CLG
  - Mercavia

- CWT
  - CWT Intranet
  - WCT Intranet WW

- CRW
  - The Intranet

- CSS
  - ServiceCenter
Challenges

• Portal champions face an argument that, because the business has been able to operate in the past without a portal, a portal must not be essential.
  – The fallacy of this argument is that it assumes the core needs of the future business environment are the same as those of the past. Portals have been driven by recognition of changes in the business, such as increased adaptability required by business processes, more technology components required to handle each business process (and a corresponding exponential increase in integration hassles), information overload, greater geographical dispersion of project teams, competitive pressures for greater customer intimacy, and tighter relationships with business partners and suppliers.
Challenges

- If enough resources are not committed to the portal framework, its failure is ensured, because most users will continue to utilize existing business processes and applications.

- As with most IT initiatives, use of the portal must be stimulated by generating demand through killer applications. The key is to offer new functionality that does not exist in some other form.
Challenges

• Users already have access to teamware and instant messaging, not to mention existing business applications. The new functionality that draws users is typically automating business processes that most affect users, and providing easy access to information at key knowledge points (e.g., expertise location).

• A portal will most likely be a bad decision when the features are not utilized or ingrained in the organization's workflow process or culture.
Benefits of an Enterprise Business Platform

- Revenue benefits
  - Work force productivity
  - Innovation and reduced cycle time

- Cost Reduction
  - Operational efficiency
  - Better information flow and knowledge
  - Consistent infrastructure

- Organized information
  - Targeted, more relevant

- Single sign-on
  - Fewer passwords, better user experience

- Common Presentation
  - Consistent user interface
  - Pervasive access

- Unification of applications
  - New ways of accessing old applications
Agenda

• What is CRM
• Identifying CRM opportunities
• Break
• Organizational strategies for CRM
• Open microphone
Misconceptions of CRM

2. **CRM is only for Customers**

   - **Reality:** CRM can and should be applied to:
     - Business partners (B2B)
     - Employees (B2E)
     - Why wouldn’t you treat your most valued business partners and employees in a way that matches their needs
     - Hold this thought for our open mike discussion
Creating an effective CRM based organization

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