



*The Adroit Edge*

## *Welcome to The Adroit Edge*

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## The Adroit Edge



### Our CEO's Perspective on Trends in CRM Strategies

August, 2005

Welcome to *The Adroit Edge*, a newsletter from Adroit Consulting for our clients and other interested parties. In this and future issues, we will share real world case studies and perspectives on the successful operational strategies that companies, like yours, are using to increase sales.

In this inaugural issue, I wanted to provide a perspective on one of the challenges that tops the list for many companies who seek our assistance.

The challenge is navigating the tangled web of promises and technologies broadly referred to as CRM. Unlike the abundance of literature in the market, this is a perspective from the view of an operating executive who looks to CRM as a strategy for profitable sales growth.

CRM is a business strategy more than a technical project. As a business strategy, it broadly encompasses the holistic view of managing and retaining customers, but the ultimate goal is to increase sales profitably. These are difficult, costly and complex strategies to implement.

Today, more than a third of all CRM projects exceed their planned budgets by an average of 46%. Two major causes of cost overruns are unplanned functionality and additional customization resulting from poorly defined processes.

More than a third of companies that launch CRM efforts scale back after their initial investment due to an unclear definition of CRM across departments and a lack of technology adoption. In addition, even companies who successfully navigated ERP projects, fail to adequately plan for the complexity of CRM in large part due to the informal and constantly changing business processes common to the Demand Chain.

More and more companies are using the concept of a CRM Roadmap to successfully avoid these problems before making major investments and changes to their sales and support operations.

Simply put, a CRM Roadmap is a plan that represents the Who, What, When, Why and How of a CRM Strategy. If properly done, it not only defines the priority of both technical and operational initiatives but also provides a detailed cost justification tied to quantitative business measures. An additional benefit of Roadmaps is that they provide revealing insight into the processes and performance of the sales, support and, often, operations functions before companies launch integrated efforts to improve them.

To share more, we have included several recently published articles on the subject of CRM and effective performance metrics from *Contact Professional, Sales & Marketing Strategies & News* and *CRM magazine*.

Once again, welcome to *The Adroit Edge*. We look forward to providing future issues and topics to help you successfully increase sales for your company.

Stan Martin, CEO  
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## Adroit Consulting In the News

The one question that all reporters ask when they have the opportunity to meet with Adroit Consulting CEO Stan Martin is:

*What makes Adroit Consulting **unique**?*

And over and over again, Stan says that it is the firm's *dedication to delivering operational results* that sets it apart from other consulting firms. One way that Adroit Consulting ensures operational results is by establishing meaningful performance metrics, staying focused on client's customers and ensuring implementation success. Reprinted below are three recent articles authored by Adroit Consulting partners and featuring Adroit Consulting insights.

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### **Five Strategies For Creating Meaningful Performance Metrics**

*www.ContactProfessional.com, December 28, 2004*

There is no shortage of performance metrics surrounding most contact centers. Telephony, quality systems, CRM and other tools provide a multitude of metrics – almost too many!

So how does a contact center professional sort through the data to select metrics that will allow management to drive true performance improvement? What are the roadblocks that need to be eliminated? [View Complete Article](#)

*By Darci Moore - Partner, Adroit Consulting*

Article originally prepared for *Contact Professional* magazine and *CP Wire* and reprinted with permission.

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### **You've Got Questions. We've Got Answers.**

*CRM Magazine, March 2005*

Industry Experts Address the 10 Biggest Concerns, Quarrels and Potential Missteps That Can Jeopardize Your CRM Efforts

**Problem:** Sales automation alone is not solving the pricing and availability issues with my complex product sales. What can I do?

**Solution:** Darci Moore, Adroit Consulting partner, says that companies with custom engineering or build-to-order manufacturing processes must learn to drive the sales and production processes in tandem. [View Complete Article](#)

Excerpted from March issue of *CRM Magazine*. For the full article, see the March issue:  
(<http://www.destinationcrm.com/articles/default.asp?ArticleID=4875>)

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### **CRM – More Than Just Software**

*Sales & Marketing Strategies & News, December 2004*

There has been no shortage of movement designed to improve the way we do business over the past decade -- business process re-engineering (BPI), enterprise resource planning (ERP), sales force automation (SFA) and, of course, customer relationship management (CRM).

Executives and manager have struggled and even been defeated by such movements. Technology firms and armies of consultants painted colorful benefit portraits of each new movement, but when those promises failed to materialize, there was plenty of blame to go around. [View Complete Article](#)

*Stan Martin - CEO Adroit Consulting, Inc.*

*Stan Martin is a founding partner and CEO of Adroit Consulting, Inc., Chicago. His early career included senior management positions at Ernst & Young, LLP; Siemens-Nixdorf AG and IBM.*

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Client Spotlight:

# JUST ADD WATER: Companies Benefit, Gain a Competitive Edge

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By John Doherty

*Called by a client to launch an innovative initiative designed to increase customer loyalty without distracting from the core business, Adroit Consulting said yes and stepped into a project tailor-made for the firm.*

In 2002, a major brand power tool manufacturer approached Adroit saying “We were debating how to reach beyond our distributors and retailers to connect directly with tool users in order to drive incremental revenue in the business. Any ideas?”

The dilemma was two-fold: how to generate new revenue and how to build loyalty with indirect customers. Not unusual in today’s multi-channel marketplaces.

Like many power tool manufacturers and other consumer product goods (CPG) companies, channel partners held and managed the customer relationships leaving the company with indirect relationships with users of their tools.

For the Adroit Consulting team, the challenge was palpable, and the options multiple. The firm’s collective experience running manufacturing operations and its

first-hand knowledge of the software/technology industries proved the perfect combination of insight and real world experience.

Ultimately, the team created an innovative market solution and launched a distinctly different conversation in the marketplace with end users in the building trade. To ensure the client was not distracted from its core business, the Adroit Consulting team fueled the operation. According to John Doherty, the lead partner on the project, the company appreciated Adroit’s turnkey capability – to manage new initiatives in uncharted areas allowing the company to focus on its core business.

## What Adroit Consulting Did

The team created a new service offering, recognizing that an ongoing issue facing tool users at building locations was the need to track and manage tool

inventory. So, Adroit Consulting recommended, tested and then developed a tool management software program for contractors.

## In the course of the project, there were four threshold moments:

1. Gaining acceptance from the marketplace. Focus groups organized and run by Adroit Consulting proved that Adroit’s client could believably play in the space. The focus groups agreed that an engineering/design company that brings tools to market would be successful in bringing a software product to market because it would employ the same strong fundamentals in design.

2. Deciding to expand, four months later, beyond a single product to develop a collection of digital power tools. The experience of the Adroit Consulting team helped them make this product development decision quickly, and they chose to create

a suite of products which have provided an umbrella under which to evolve the digital offering. In three years, this client successfully launched three nested software tools for tool end users.

3. Deciding, 18 months in, to expand the audience focus from one group of users (builders) to another group of users (professional trade). This shift required the company to begin engaging with its distribution channels and sales force. Distributors now request the tools because their customers are.

4. Moving from product offering to a combined product and service offering. The product offerings were built on technology foundations that allow the company to provide services to their user customers. Three different offerings now provide a multi-faceted digital suite of products and services to track and secure tools. New options and

services developed since the initial launch include: RFID tags built into tools, special order tags for tools, electronic alarming portals for job-site gates, software for internal purposes and digital tracking of service history.

### Did the Outcome Hit The Mark?

Yes. Adroit Consulting built a new revenue stream on its client's behalf without a huge investment in infrastructure.

Vast experience, mature skills and sound processes allowed the Adroit team to see and in some cases, sense the market shifts ensuring responsive timing and quick execution. The company seized a market advantage. Now it has integrated the product and service offering into its own core business. From product development to product marketing, Adroit's team

helped change the power tool category by responding to the evolving marketplace. In the end, they enabled the company to find a way to better "compete without competing."

For Adroit Consulting, the ultimate measure of success is to work its way out of a job and leave the client with an operating success.

Mission accomplished.

*John Doherty, Partner  
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## Calendar

**June 1, 2005**

**Adroit Consulting expands to new offices.**

Adroit Consulting opened its new offices in Northbrook, Illinois in May. Please note our new address at the bottom of the page.



**September 27, 3005**

**Assembly Technology Expo - “How Manufacturers Will Reshape CRM”**

Donald Stephens Convention Center, Rosemont, IL

Please join Adroit Consulting Partners John Doherty and Darci Moore to learn how manufacturing companies – after years of relying on their product expertise – MUST transform into customer-centric organizations to effectively compete. CRM technologies and processes will provide the roadmap.

They will describe 10 Steps that manufacturers can take to transform themselves from product-centric to customer-centric organizations and achieve success in the CRM space, avoiding the pitfalls of their predecessors. And they will provide sample metrics for firms to consider including: CRM program effectiveness, customer experience, revenue and operational efficiency.

**Announcing the “2005 Executive Workshop Series”**

*On Site Sessions:* By Appointment Only

*General Sessions:* Schedule to be announced

**Executive Workshop on Improving Operational Performance**

Lead by Adroit Consulting Partner Bill Williams, this series is designed to educate attendees about the use of incentives, measurements and performance-based process improvement to transform your company’s performance and culture.

- Learn how to measure the “real” (shareholders) bottom line for your firm and the link to specific operating levers.
- Learn how to translate shareholder expectations into operational benchmarks to drive and measure performance improvement.
- Learn about powerful methods (e.g., Six Sigma) to improve customer satisfaction, process speed, and return on capital.

For more information on our events, visit us at [www.adroitconsulting.com](http://www.adroitconsulting.com).

Adroit Consulting is an operational consulting firm, specializing in developing strategies and implementing operational improvements in sales and sales support for mid-sized companies and divisions of the Fortune 500.

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