Customer Relationship Management (CRM) and Content Management System (CMS), Do We Need Both?

In today’s business environment, customer relationship management (CRM) systems are used by millions of businesses to automate routine sales and marketing activities around customer acquisition and customer retention functions such as customer service that drive revenue into the organization, or prevent current customers from seeking other suppliers. Most of the solutions in the marketplace today typically address:

- Sales Automation
- Lead And Pipeline Management
- Custom Customer Databases
- Campaign Management
- Document And Contract Maintenance
- Online Product & Service Offerings
- Customer Portal Self-service
- Mobile Application Access
- Social Media Support

Many companies that have implemented a CRM platform report substantial cost savings and overhead reduction by pushing CRM usage throughout their organizations, but the largest returns center around creating efficient transactions with the company’s customers.

On the other hand, most people tend to think of content management systems (CMS) as an easy to use interface for making regular changes to the company’s website. While it is true they can all be used in that capacity, the most effective companies embracing CMS technology also treat their chosen application as the company storehouse of all of the information assets of the company and its use is to organize and share such information across a wide base of employees as well as customers through well-managed, and centralized communication channels. Information maintained by the CMS application usually contains not only the company’s website text copy and related images, but also detailed product and service catalogues, product specifications, options, engineering diagrams, customer service policies, training programs, brand standards, purchasing procedures, Human Resource policies, Operations Manuals, and just about any other department to benefit from streamlined publication, review, and modification of their information assets over time.
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When combined with forethought and common sense, the two types of applications can be combined for outstanding results. For example, I may want my customer service agents to have access to a product database at the time of order (say CRM) to ensure accuracy in processing a transaction, but I don’t need to use a small screen to display the entire catalogue and associated options, specification, and detailed diagrams, etc. available in a CMS on a small screen with only a precious amount of real estate available to the agent.

By allowing the CMR to serve content that tracks past purchases, preferences, all correspondence between the customer and the company, as well as any contracts or documents that follow the customer, and deriving natural groupings of customers based on their history with the company and their preferred method of communication, the CMS can be used as the internal repository to maintain version control and changes to standards, procedures and services over time as they occur.

In combining a CRM and CMS and letting each application to work on its preferred sources and flows of information, you can maximize your return much faster than if you had implemented each without consideration of the other. Management will have to make the call as to which store of information (CRM or CMS) will serve as the master file to be maintained by the organization (and by whom) and which will serve up content when called upon for further research and information.

If you currently maintain one of each type of application as a standalone solution, you should seek the advice of an independent consultant familiar with both types of systems to define what is possible and at what cost. You may be surprised at the returns that are capable with a combined solution in a short amount of time.