CASE STUDY ON

- LEVERAGING CUSTOMER FEEDBACK TO BUILD LOYALTY
  MEGAPATHS NETWORKS
- CRM CASE STUDY OF RAYMOND
- CRM AT ICICI BANK Ltd.
- DEVELOPMENT OF CONSUMER RELATIONSHIP
  MANAGEMENT SYSTEM FOR INDIAN AUTOMOBILE GIANT
  XYZ LIMITED

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MANAGEMENT

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DECLARATION

This is to declare that I have carried out these case studies myself in part fulfilment of the Post Graduate Diploma in Business Administration Specialization in Customer Relationship Management of SCDL.

The work is original, has not been copied from anywhere else and has not been submitted to any other University/Institute for an award of any degree/diploma.

Date: ___________________ Signature: ___________________

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Case Study 1:

LEVERAGING CUSTOMER FEEDBACK TO BUILD LOYALTY

MEGAPATHS NETWORKS

Name of the Company: Megapaths Networks

Type of the Company: Network Solutions

The Business Case:

Megapaths Networks delivers secure access and managed network solutions that enable business of all sizes to cost-effectively connect branch officers, mobile workers and home-based workers to centralized corporate resources. Megapaths wanted to get a solid fix on customer feedback and find a way to translate it into loyalty.

When Adrienne Dale joined the company, she brought with her a great deal of experience about establishing a formal survey process for gaining customer satisfaction data as well as processes for analysing and acting upon the data. As a result, Megapaths has been able to tie customer satisfaction levels to things such as response time to queries and number of interactions with support – then takes appropriate action.

In her previous job, Adrienne Dale worked at a company that religiously captured customer satisfaction data but did “absolutely nothing with it,” said Dale, who is now senior vice president at Megapaths Networks, Inc. and who brought the lessons learned and programs established in her prior employment to her current work environment.

Before she started at Megapaths, Dale devoted considerable effort to “marrying the customer satisfaction data with transactions and other data that we had to make actionable, get actionable data and get results,” Dale said. When she got to Megapaths, the company didn’t have a format customer satisfaction program in place, but instead got feedback from customers in a more random fashion”. Because it was only random customers or those customers who felt so strongly that they proactively were going to contact us, either the feedback was diminished or it was inflated beyond its significance where we were jumping through hoops because of what one customer thought,” she explained.
The Solution

- **Develop a Formal Customer Satisfaction Survey**

One of her first moves was to implement a formal customer satisfaction survey program that allows the company to put the information in context so the company response could be appropriate to the feedback. First and foremost, she developed a survey that focused on the customers of the company as a whole, sort of resist the pressure or we’re being seduced, and we’re just going to survey this little bit. She needed to see how the sales operation was doing, so I’m just going to survey the sales operations piece, “When a customer’s giving you feedback, get the whole picture, understand as much as you can,” she advised.

But, she cautioned, the information had to be linked up to transactions so it has meaning and is traceable (See graphics below). Frequency of data collection is critical, too. “Something that’s once a month just feels glacial and if it’s slower than that, gosh…….. attain, in contrast, if you have very large accounts with really big relationships, once a quarter, twice a year is probably enough, and you need a little time for your changes, because you’ve got now your ocean liner, are going to be slower”. Dale said.

**Time to Resolution**

**Finding:** Overall satisfaction generally falls as the number of interactions with support rises.

**Action:** Analysing why issues remain unsolved at first and second contact; develop training to increase early contact resolution
Response Time Impact

Finding: Overall satisfaction falls as response time lengthens.

Action: Focus on response time management to drive down response time.
Dale noted that when designing a survey, a company must keep its end objectives in mind. Really key for your designing your survey program is to identify what are your end objectives? "What do you want to be able to measure, and build that in? If you haven’t designed that up front, you're going to find yourself frustrated. I want to answer this question but I can’t connect all the dots, and very simple stuff, but map the data sources,” She contended. And companies should ensure that the length and tone of a survey doesn’t turn customers off.

**It’s not just what you Do, but the Way You Do It**

The mechanism, too, has an impact. Online surveys are fine though “it doesn’t work for every industry, but when it does, it’s the best way to go. The intention is important. How do you solicit customers to participate?” she said”. And, it should be a very personal message over the signature of the highest level involved executive.

Currently, Megapaths is using Right Now Technology Metrics and, Dale noted, “There are a lot of great companies out there. This is a really cost effective way to go”.

No matter what vendor solution is selected. Dale urged companies to look for certain features. “You want to look for are build-it-yourself questionnaires so that you’re not having to stand in line to get somebody to build it for you plus pay them for it,” she said. “Online statistical and graphical reports, you should be able to get that out of whatever product you’re using, and the ability to download that data so you can do more with it, because you’ll find that once you get gong, there is more you want to do”.

While granular data can let companies drill down to individual situations, it can be overwhelming. “It’s real easy to just get lost in those details, so an important balance is to look for patterns and rise up to say, 30,000 feet.

**Analyze the Data**

Once collected a company can scrimp on analysis, “You have to commit resources to this,” said Dale. “What is the point of saying, ‘Oh our customer satisfaction is X, or customer loyalty factor is Y,’ if you are not trying it to things that you can then do something about”.

And Dale cautioned that CVM is “a continual thing. With any kind of satisfaction or loyal improvement effort, it is continuous; it takes relentless effort and sustained focus”. said Dale. “There is no joke here, it’s just a lot of hard work, and you have to be ready for that. ‘OK, we
are going to look at the data every other week, we are going to look at the data once a week, we’re going to look at the data every other week, we’re going to look at the data once a week, we’re going to roll things up.’ And when these kinds of issues come to us, we need to develop knowledge so we’re handling it better, so that regardless who fields that call, who interacts with that customer, we’re telling them the best answer, the best solution, the first time, that may be a knowledge issue, so if you have a knowledge development team, that would be their baby”. Dale encouraged companies to coach and train employees so they are all on the same page when it comes to dealing with information and different scenarios. “What I’ve done and at MegaPath and at companies before, is that this is something that once a week, a group of people cross-functional looking at the data, with everyone coming back. ‘Look here’s my action.’ And doing something where they’re putting that into action fast enough like tomorrow or the next day, so that by the time we meet next week or maybe if you’re in a slightly slower cycle, in two weeks, we can see, did what you do make a difference? Do we need to fine tune it? You know that’s why I’m talking about that rapid response, rapid action, and fast rapid feedback so you actually can make some changes”.

Without rapid response, parts of the company can become frustrated. They will feel “like operations is dragging down all our efforts to increase customer loyalty and to increase our stickiness with our customers, why are they moving so slow, so it’s a real big imperative that you are getting the data fast enough, acting fast, and then getting that feedback on the impact of the actions that you were taking,” she said.

Overall, though, relentless focus is critical. “It is just never ending, it can’t be OK, this quarter we’re going to do customer satisfaction, it’s week after week, and really, for your frontline people, it’s day after day, hour after hour. It has to be something that’s in their brains, that constant feedback, and it’s feedback as fast as possible, here’s what you heard, this is what customers are saying about you, really important for people to have that”.

**Sidebar: Step by Step**

Turn measurement into results

1. Cost-effective and easy to use: web-based surveys

2. E-mail invitation over signature of highest-level involved executive (VP or above)

   a. Affirm commitment to customer satisfaction and ask for feedback
b. Include link to on-line survey and opt-out link.

3. Ensure completed surveys are tied to customer contact record ID for tracking and analysis.

**Establish a continuous process**

1. Establish a continuous quality improvement process

2. On an on-going basis, consolidate and present current results and trends.

3. Identify correlations between satisfaction and loyalty to other factors
   - Product
   - Issue type
   - Response time

4. Search for patterns -30,000 ft view


Case Study 2:
CRM CASE STUDY OF RAYMOND

About the company:
Raymond India is, a chain of retail stores offering wardrobe solutions for men. This includes brands like Raymond, Park Avenue, Parx, Manzoni and now Colour Plus. Started about five decades ago, Raymond has been one of the pioneers of Indian retail. The Raymond Shop network started with a small corner shop in Ballard Estate, Mumbai. It has grown multi-fold with a dedicated team making it the largest retail store chain in the country with over 300 stores in prime locations in 150 Indian cities. They have also extended their network overseas with around 25 shops in 15 plus cities of the Middle East, Sri Lanka, Bangladesh and Nepal. The Raymond Shop retail chain occupies a space of 1 million square feet built-up area. The Raymond Shop offers over 3,000 qualities, shades and designs of Raymond fabric.

One of India’s oldest textile manufacturers and retailers, Raymond India operates across cities and deals with different cultures and people. Knowing all these customers and doing business accordingly is not a cakewalk. To deal with this scenario Raymond India decided to implement CRM (customer relationship management) across most of its retail outlets.

Know your Customer:
Retail is all about knowing your customers thoroughly in order to serve them better. It is an age old philosophy of Indian businessmen that if you know your customers better, you can enjoy a better competitive position in the market. Before making extensive use of IT at its outlets, Raymond’s business used to run on a manual basis. In order to know its customers better, a team was formed to survey prospective buyers as well as existing customers. After surveying them they would know the pattern of their purchases, their likes and dislikes etc.

This process was cumbersome for the surveying team and at times people were apprehensive about replying to questions related to their personal choices. With the growing use of IT in the retail segment, Raymond decided to implement CRM to know its customers better and in a more sophisticated way. The need was to understand the customers and provide services suitable to them.

The Solution:
Customer Relationship Management was implemented by Raymond to solve the problems of knowing the customers better. CRM helps the company understand the colour and design preferred by a particular age group or why a particular group or individual did not buy or did buy a particular product. As a result of the implementation, regular customers get a premium card which has all the details of a particular customer and the purchase patterns of that person can be studied efficiently.

The CRM implementation is named ‘Premium Circle’. Customers using it are known as premium users and are given a premium card. This is offered to Raymond customers at 265 out of 365 Raymond Shops in India. With the help of this solution, a central repository of information is created about premium customers whose details are accessible at any retail outlet where this system has been implemented.

The implementation:

The technology part of the CRM implementation was outsourced to Proximity which owns the infrastructure that provides touch points to the customer through the Web site.

Raymond’s in-house team was responsible for devising the schemes and plans. Since only the technology part was given to a third party to manage, cost and quality of service provided by the vendor were considered while short listing a vendor.

The Retail head from the business side was the champion of the project and he was assisted by the IT department to provide the technological expertise that was required.

Three principles:

The aim of this implementation was to ensure three principles—availability, reliability and scalability of the solution. Concentrating on availability meant that the solution had to be available at all times and that downtime had to be negligible. Failsafe software would ensure the reliability aspect of the solution. Lastly scalability ensured that the system would work efficiently irrespective of the number of locations at which it was rolled out. With organized retail in the midst of a boom, it is natural that the number of outlets will grow rapidly putting more pressure on ensuring scalability across the chain.

Phases:
The time line for the entire project was close to three months and it was completed in three phases. The first phase consisted of the Proof of concept. In this phase the project was cleared through internal research to prove that the core ideas were workable before going any further. This use of proof of concept helps establish viability, technical issues are uncovered, and overall direction is set. It also helps in providing feedback for budgeting and other forms of commercial discussion and control.

The second phase involved running a pilot model created by the project team. This was to ensure that the core solution has been developed satisfactorily and was running as per the requirements.

In the final phase, the entire Web based project went live across 265 shops. Initially only 10 shops went live but soon 265 shops were on the network.

**Hardware:**

The entire solution runs on HP servers on Windows Server with the SQL Server database. The database for the CRM is located on a web database server hosted by the vendor at an ISP IDC.

The servers are in high availability mode with redundancy at the server link level. In case of a breakdown of the link, the recovery time is approximately an hour.

**Customer Response:**

Since this project was Web based, many customers are using it across India. This project helped evaluate customer choices to a large extent. With the use of this software, the product lines kept changing according to the customer needs and patterns and the end result has been satisfied customers. The repeat visits made by each customer increased with the help of CRM solution. The only time customers were left a bit dissatisfied was when the database of that customer was not updated properly during the initial days after going live. The overall happiness of the customer has boosted business by a substantial margin.

**Enhancements:**
Looking at the success of this CRM implementation Raymond decided to extend the similar exercise to its other product lines and brands such as kids wear. This implementation is going to be implemented across 1,000 shops.

Case Study 3:
CRM AT ICICI BANK Ltd.

The Bank went on to cross-sell and up-sell its products aggressively, growing into India’s second largest bank. But ICICI was not only looking at banking. In 1993, the company set-up ICICI Securities and Finance Company Limited in a joint venture with JP Morgan, and the same year, it set up ICICI Asset Management Company. This was the just the beginning; several mergers, acquisitions and joint ventures followed.

ICICI is one of the leading private sector banks in India, which combines financial strength with a reputation for innovation and a universal culture that embraces change. ICICI, a colossal presence on the Indian financial scene, has an element of enormity in all that it does from ambition to projections and achievements. Ranked as the number one bank in India several times, this institution appears virtually unstoppable, but can it, in fact, fall prey to weakness?

ICICI’s impressive rise over the last couple decades cannot be denied, but now as the brand starts to over extend with a dizzying array of products and services, one worries that an impressive fall may follow.

ICICI Bank is India's second-largest bank with total assets of Rs. 3,634.00 billion (US$ 81 billion) at March 31, 2010 and profit after tax Rs. 40.25 billion (US$ 896 million) for the year ended March 31, 2010. The Bank has a network of 2,529 branches and 6,102 ATMs in India, and has a presence in 19 countries, including India.

ICICI Bank offers a wide range of banking products and financial services to corporate and retail customers through a variety of delivery channels and through its specialised subsidiaries in the areas of investment banking, life and non-life insurance, venture capital and asset management.

The Bank currently has subsidiaries in the United Kingdom, Russia and Canada, branches in United States, Singapore, Bahrain, Hong Kong, Sri Lanka, Qatar and Dubai International Finance Centre and representative offices in United Arab Emirates, China, South Africa, Bangladesh, Thailand, Malaysia and Indonesia. Our UK subsidiary has established branches in Belgium and Germany.
ICICI Bank's equity shares are listed in India on Bombay Stock Exchange and the National Stock Exchange of India Limited and its American Depositary Receipts (ADRs) are listed on the New York Stock Exchange (NYSE).

**SWOT ANALYSIS**

**STRENGTHS:**

1) Online Services: ICICI Bank provides online services of all it’s banking facilities. It also provides D-Mart account facilities on-line, so a person can access his account from anywhere he is.

[D-Mart is a dematerialized account opened by a salaried person for purchase & sale of shares of different companies.]

2) Advanced Infrastructure: Branches of ICICI Bank are well equipped with advanced technology to provide the customers with faster banking services. All the computerized machines are located in suitable manner & are very useful to the customers & staff of the bank.

3) Friendly Staff: The staff of ICICI Bank in all branches is very friendly & help the customers in all cases. They provide faster services along with bonding & personal relationship with the customers.

4) 12 hrs. Banking services: Compared to other bank ICICI bank provides long hrs. of services i.e. 8-8 services to the customers. This service is one of it’s kind & is very helpful for the customers who are in urgent need of money.

5) Other Facilities to the Customers & Employees: ICICI Bank also provides other facilities like drinking water facilities, proper sitting arrangements to the customers. And there are also proper Ventilation & sanitary facilities for the employees of the bank.

6) Late night ATM services: ICICI bank provides late night ATM services to the customers. The ATM centers of ICICI bank works even after 11:00pm. at night in certain branches.
WEAKNESS:

1) High Bank Service Charges: ICICI bank charges highly to customers for the services provided by them when compared to other bank & that is why it is only in the reach of higher class of society.

2) Less Credit Period: ICICI bank provides credit facilities but only upto limited period. Even when the credit period is not over it sends reminder letters to the customers which may annoy them.

OPPORTUNITIES:

1) Bank –Insurance services: The bank should also provide insurance services. That means the bank can have a tie-up with a insurance company. The bank will advertise & promote the different policies introduced by the insurance company & convince their customers to buy insurance policies.

2) Increase in percentage of Returns on increase: The bank should provide higher returns on deposits in comparison of the present situation. This will also upto large extent help the bank earn profits & popularity.

3) Recruit professionally guided students: Bank & Insurance is a special non-aid course where the students specialize in the functioning & services of the bank & also are knowledge about various tax policies. The bank can recruit these students through tie-ups with colleges. Such students will surely prove as an asset to the bank.

4) Associate with social cause: The bank can also associate itself with social causes like providing relief aid patients, funding towards natural calamities. But this falls in the 4th quadrant so the bank should neglect it.

THREATS:
1) Competition: ICICI Bank is facing tight competition locally as well as internationally. Bank like CITI Bank, HSBC, ABM, Standered Chartered, HDFC also provide equivalent facilities like ICICI do and also ICICI do not have consistency in its international operation.

2) Net Services: ICICI Bank provides all kind of services on-line. There can be easy access to the e-mail ids of the customers through wrong people. The confidential information of the customers can be leaked easily through the e-mail ids.

3) Decentralized Management: Each branch manager is given the authority of taking decisions in their respective branches. The decisions made by different managers are diverse and any one wrong decision can laid to heavy losses to the bank.

4) No Proper Facilities To Uneducated customers: ICICI Bank provides all services through electronic computerized machines. This creates problems to the less educated people. But this threat falls in the 4th quadrant so its negligible. The company can avoid this threat.

Question:

1) Explain the initiatives taken by ICICI bank to promote CRM?

2) Discuss the benefits of the initiatives taken by ICICI bank to promote CRM?

3) What should be the core elements of CRM that ICICI bank in your opinion should follow, besides what they are already following to make themselves a distinct bank from their competitors?

4) Outsourcing CRM is one activity that most organizations follow. Is it a viable option? Give your views keeping in mind the cost involved in implementing CRM and enhancing business also.

Answer 1:
The important steps which were taken by ICICI bank to promote CRM are as following:

**MOBILE ATMs Facility:**

ATMs are kept in vans and parked at high traffic areas at specified timing to facilitate standard services.

**Bulk deposit facility through ATMs:**

ICICI bank issues a special card ‘deposit only card’ to facilitate deposition of large amount at one time though ATMs unlike conventional ATMs which allows deposition of only 30 notes at one time.

**Cash pick – up service:**

It also facilitates cash pick up service for business customers under business banking segment.

**ATMs for visually challenged:**

ICICI bank has launched special voice-guided systems, which guide a visually challenged person to avail ATM services without any help. Headphone can be connected to ATM jack who gives voice command to the customer to transact business.

**DEMAT A/c Facility:**

ICICI bank gives an option of opening D-MAT A/c and trading A/c simultaneously with saving A/c through which customer can do share trading online.

**Other services through ATMs:**

- Prepaid mobile recharge
- Buying and renewing internet packs.
- Making donations for Shri Mata vaishnodevi shrine and Tirupati, nathdwara temple.
- Mutual funds transaction &
- Bills payments.

**Credit card facility through mobile:**
Airtel, ICICI Bank, and VISA launched a new service mChq, which is a credit card using a mobile phone.

**Social events:**

It organises the domestic invitational amateur golf event for high net-worth individual customers.

**Mobile banking benefits:**

It enables customers to avail following facilities by just sending an SMS.

- Locating ATM
- Locating Branch
- Locating drop box
- Alert facilities like salary credit etc.
- Queries on banking & Demat A/c.

**Answer 2:**

Due to the initiatives taken by ICICI bank to promote CRM it got following benefits:
1. **Identification of customer usage pattern**-

ICICI bank’s CRM data warehouse enables users to find out customer’s various transactions and regarding the customer’s channel usage.

2. **Development of new products**-

CRM data warehouse enables analysis and behavioural explorer, which help in customer profiling using adhoc queries. Which facilitates new product development according to customer needs and desire?

3. **Central database management**-

CRM data warehouse helps in analysing its customer database which includes information from eight separate operation systems like retail banking, bonds, credit cards etc.

**Answer 3:**

Many have confused CRM as a technology initiative, and assigned the CRM implementation project to their information system or information technology group. Technology is needed in
order to implement CRM – particularly the customization part – but technology is not the driver of CRM, or the solution to successful CRM implementation.

Other core elements of CRM which ICICI should follow are as following:

**Deliver on customer’s value definition:** Customers change as they move through differing life stages; so they have to be alert for the changes and be prepared to modify the service and value proposition as customer change.

**Prioritising changes:** Because there might be many gaps, therefore many changes that an organisation will need to make, prioritization was critical.

**Answer 4:**

Every business is distinct from another, and its nature of operation matters a lot when it comes to decide strategies, it should adopt. Outsourcing CRM is a strategy which is currently adopted by many companies due to high capital investment and technicality required in operating it on their own. Outsourcing CRM has its own advantages and drawbacks which are as following:

**BENEFITS:**

- It reduces capital investment in implementing CRM.
- Company can concentrate on its core competency area rather than involving in CRM implementation.
- It prevents from doing major changes in operation process.
- Highly efficient service can be availed because service providing companies already have a good setup and they have good experience of managing CRM.
- It reduces operating cost of CRM because service providing companies distribute their operating cost by providing services to other firms simultaneously.

**DRAWBACKS:**

- It prevents from establishing own CRM operating system
- Customized information may not be available due to outsourcing of CRM.
For a large firm which have high number of customers, outsourcing can become an impediment. Because in such case it is more beneficial to do one time long term investment in implementing CRM rather than outsourcing.

In summary, the choice is no longer between an outsourced and an in-house solution, there are many hybrid models offering viable alternatives. It is essential to carefully evaluate each option in terms of the proposed benefits, all the costs (including overheads, redeployment or redundancy of existing staff and so on) and the risks firm will incur, whether in changing its customers management model or in maintaining the status.

Case Study 4:

DEVELOPMENT OF CONSUMER RELATIONSHIP MANAGEMENT SYSTEM FOR INDIAN AUTOMOBILE GIANT XYZ LIMITED
The idea of this case study is to develop a CRM system having 360-degree view of automobile Customers for XYZ Ltd, an Indian Automotive company.

XYZ Ltd is one of the largest four-wheeler passenger car manufacturing company in India. It has more than 1,000,000 happy customers and operates through 54 sales dealers in 20 states in India.

Currently this company does not have its own customer database and for all customers related analysis, sales forecasting, marketing campaign, customer behavior etc, it has to procure the details from following three companies.

A. Car Dealers India Ltd
B. JD Power India
C. Car Data Inc

These companies gather customer, dealer and product data from various sources like independent marketing agencies, survey companies, websites, dealers etc, process them with different analytic instruments and sell them on a monthly basis to XYZ Ltd as various form of reports.

XYZ Ltd pays a huge amount to these companies for these formatted processed data. These data are crucial as they are used for various reporting, analysis, campaigning and sales and marketing forecasting.

To overcome the data latency, reduce cost of processed customer data, tracking, monitoring and controlling it’s own customer information real time and building a consolidated 360 degree view of customer, XYZ Ltd decided to develop and implement it’s own CRM application.

This system will help XYZ ltd to:

- Provide better understanding of its customer
- Provide better services to its customer
- Improve relationship with customer
- Improve bottom line revenue increase.

In the new system XYZ Ltd will only procure the daily files from these three companies and load them through a daily batch process to it’s CRM application repository. Then a CRM administration tool needs to be developed to which will run on this repository. The
tool will have various business functionalities to extract various different reports for Sales and marketing forecasting and customer analysis.

The CRM system will have a repository with following core areas:

- Customer
- Dealer
- Product

The details of these three core areas are described below:

**Customer:**

Customer Data comes in various formats from following different sources

Automobile Sales File (XYZ Ltd itself)

Service History File – (by Car Data Inc)

Customer Communication File– (by JD Power India)

When any customer information gets entered into the CRM system through the interface files, it will be checked for it’s existence in the database. If the same customer already exists, a “best record” will be created appending with the new customer information. If the customer is determined to be new, a new customer record is created and an unique ID (customer ID) is assigned to it. These events occur as the information is loaded into the system. The same rule applies to Dealer, product and service event records also.

The format of the input file is given in Appendix.

**Dealer:**

Dealer information is loaded in the system through the dealer file received from Car Dealers India Ltd and the file format is given in Appendix.

**Product:**

Product information is loaded from the files mentioned above respective to the various data element to the product only.
All these files will be ftp-ed in the system and the data will be loaded into the CRM repository through a daily batch process. Any bad data/unformatted data will be rejected with proper reason code and a separate file will be created with proper reason in the reject file.

The CRM application tool will enable different business users, sales and marketing users to view the following relationship in different tabs of the GUI application. The name of the application tool would be “Automobile Customer Portal” (an Auto CRM application).

2. Customer, product and Dealer relationship
3. Customer and service event relationship
4. Customer and Communication relationship
5. Customer and dealer relationship

The tool should have capability of performing following actions:

1. To view the database updates done by the flat files
2. To search customer by
   - Name and address line
   - Name and Phone
   - Name and Email address
   - Email address and phone number
3. To view the customer and product relationship with products per customer
4. To view the list of customers under specific dealer
5. To view how many products sold by each dealer in a given month or quarter of in a specific year.
6. To view how many services done by specific customer. That means service history of the customer
7. To view the communication history for any specific customer and that is for each communication channel
The Customer, Product, Dealer, Communication event and Service event should have unique value identification. That means each of these data should be uniquely identified. For example all customer data should be unique and a separate system generated number will be attached to each record.

The system could be developed in two different technology platforms.

- Oracle database and Java base GUI system (using JSP and Java platform)
- Mainframe DB2 database with CICS as front end.

**Appendix**

**Sales file.**

Customer First Name  
Customer Middle Name  
Customer Last Name  
Customer Birth Date  
Customer Sex  
Customer E-Mail  
Customer Address  (Split in Address line1, Address line – 2, City, State, Postal code)  
Phone  
Vehicle Chassis Number - 17 char long field - Example – INX019DFT1234567  
Dealer number – 4 digit unique number for dealers  
Retail Sales Date – (when the vehicle actually sold to the customer)  
Vehicle Model – Example – Indica V2, Indogo GS, Xeta GSI etc  
Model Year  
Exterior Color  
Interior color  
Financed flag (Y/N)  
Financed By  
Loan Amount
Loan tenure
Salesman Name
Dealer Pre inspection date

**Service History file**
Servicing Dealer Number
Customer First Name
Customer Middle Name
Customer Last Name
Customer Birth Date
Customer Sex
Customer E-Mail
Customer Address  (Split in Address line1, Address line–2, City, State, Postal code)
Phone
Vehicle VIN
Vehicle Registration Number
Mileage of the Vehicle
Repair Order date
Technician Name
Service Description
Labor Amount
Service Amount
Amount
Service Feedback

**Customer Communication File**
Customer can initiate various Communication events and these are:
A. Brochure Requests
B. Price Quote Requests
C. Loan payoff Inquiries
D. Additional On-line customer events (Website signup, newsletter signup)
E. Miscellaneous ad hoc communication events

The content of the file (from JD Power):

Communication channel type – example – Web, Phone, Survey, mail etc

Customer First Name
Customer Middle Name
Customer Last Name
Customer Birth Date
Customer Sex
Customer E-Mail
Customer Address
Brochure request Date
Price Request Date
Loan Payoff Date
Adhoc Communication Date
Vehicle Model Year
Vehicle Model Type
Own any Vehicle – Y/N
Method of contact
When planned to buy
When planned to loan pay-off
Communication content

**Dealer file**
Dealer ID
Dealer Start Date
Dealer End Date – Default – 31/12/9999
Dealer Zone for Service
Dealer District for Service
Dealer Name
Dealer Address
Dealer City
Dealer State
Dealer Postal Code
Dealer Phone
Dealer Phone Ext
Dealer Billing Name
Dealer Billing Address
Dealer Billing City
Dealer Billing State
Dealer Billing Postal Code