Virginia Information Technologies Agency

VITA's Customer Relationship Management (CRM) Program

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AITR Meeting

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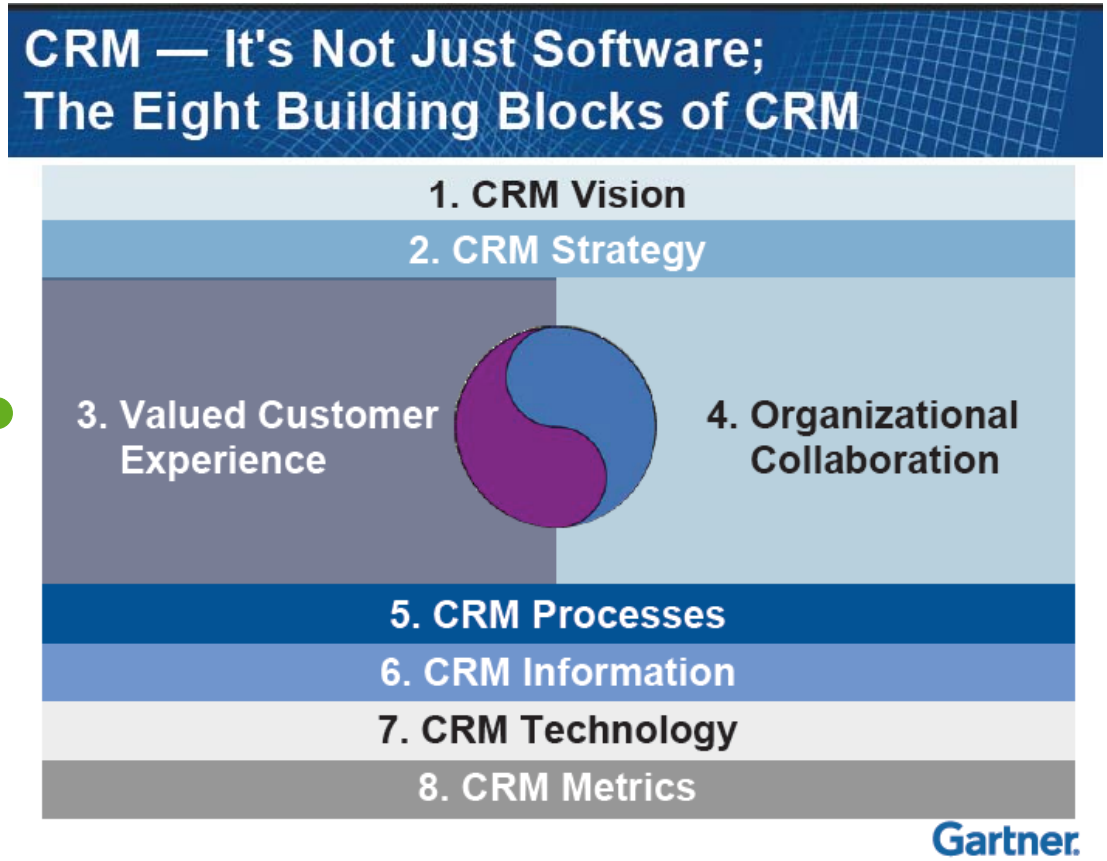
Program Overview

Eight Building Blocks of CRM



Complete
Complete

Planning

Executing

CRM Vision

- Definition of customer relationship management (CRM) at VITA
- Leadership roles
- Principles for customer service interactions
- VITA personality objective and model – VITA values
- Managing customer interaction channels
- Common practices for customer service interactions

CRM Strategy

- CRM Strategy v1.0 adopted Sept. 21, 2012
- Key elements:
  - Customer, market and competitor analysis; customer segmentation
  - Goals, objectives, measures for each segment
  - Tactical plans for each segment – tasks, dates, assignments
  - Technology needs identified
- Focus is on FY13 and FY14; some tasks stretch into FY 15

CRM Strategy Segments

VITA External Customers

Segment 1

- Use of IT infrastructure program is mandatory
- IT budget/spend average ≥ $5 million
- 16 executive branch agencies
- Across eight secretariats

Segment 2

- Use of IT infrastructure program is mandatory
- IT budget/spend average < $5 million
- 49 executive branch agencies plus the governor's office
- Across 10 secretariats

Segment 3

- All other government entities
- Federal, state and local
- IT infrastructure program is optional

Segment 4

- Only receive information
- Generally cannot and/or will not purchase products or services that VITA offers

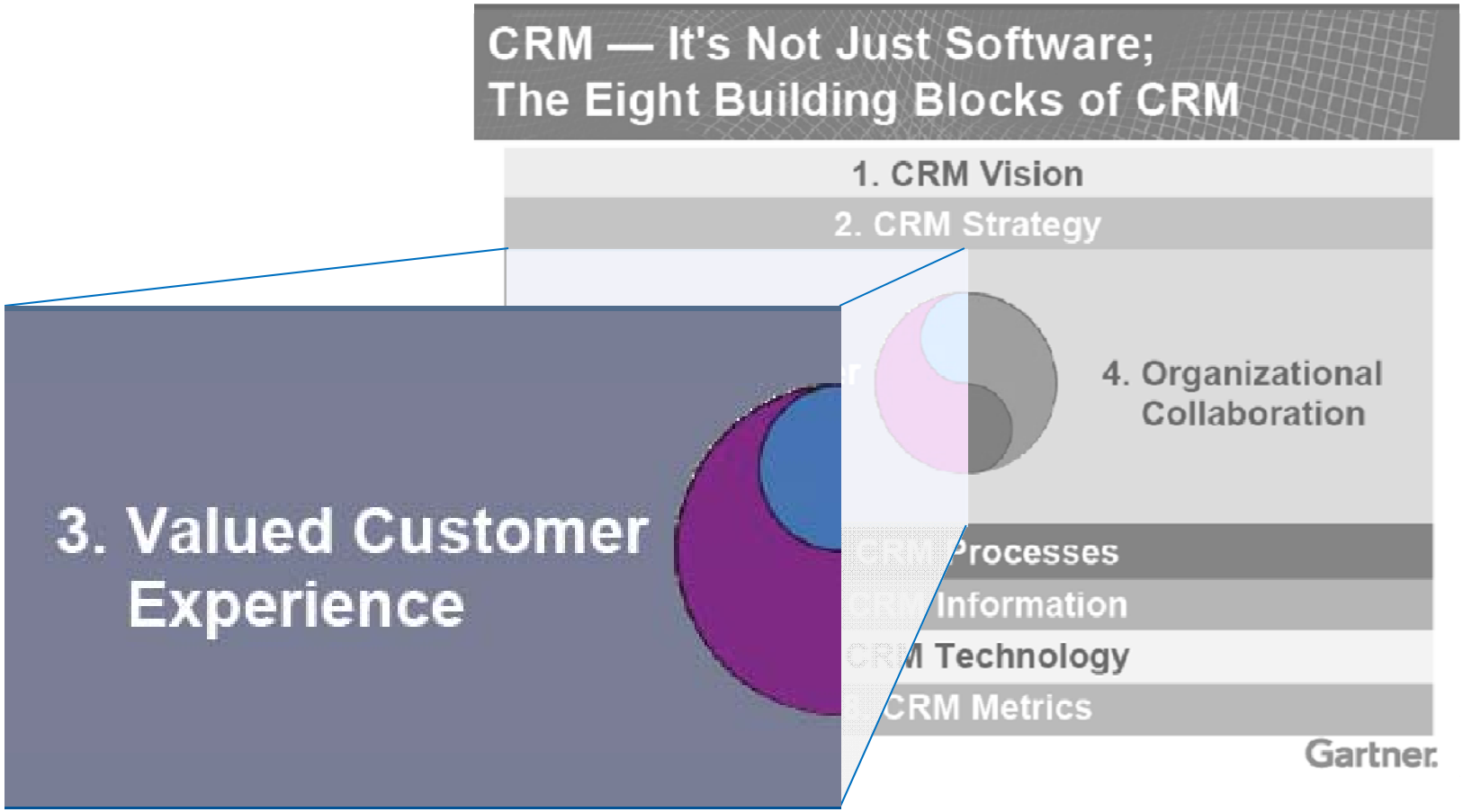
CRM Strategy – Segments 1 and 2

- **Goal**: Position VITA as a strategic partner with customer agencies
- **Goal**: Develop agile business process that recognize VITA's diverse customer base

VITA's CRM Strategy is a living document to be reviewed semi-annually and revised as needed

What's Next?

Eight Building Blocks of CRM



Define Valued Customer Experience

- Identify key customer interactions
- Map interactions
- Identify "moments of truth" (those that shape the customer's perception of the interaction)
- Identify needs for improvement
  - Processes
  - Procedures
  - Communications
  - Tools

Key Take-Aways

- The entire VITA Team is committed to a long-term, evolutionary Customer Relationship Management Program
- Will involve agencies – focus groups, surveys, etc.
- Benefits to our customers include:
  - Approaches better tailored to meet customer needs and capabilities
  - Streamlined processes
  - Consistent, quality service
  - Focus on meeting your business needs efficiently and effectively