Appendix 1. CRM Readiness Assessment Tool (As adapted from eCRM University)

Rate your readiness to measure CRM

An organization's results will make or break any CRM initiative. Take this self-assessment to find out how prepared you are to keep top management informed and committed to your CRM Program.

Rate each of the following key elements of CRM measurement and rate your current CRM measurement systems based on the following response scale:

- **five points** for a high ranking ("We're good at this; I'm confident of our skills here; I agree with this statement");
- **three points** for a medium score ("We're spotty here; we could use improvement or more experience; this statement is only somewhat true");
- and **one point** for a low score ("We've had problems with this; this is new to our CRM Program; I disagree with this statement").

Be honest. Don't trust only your own perspective; ask others in the organization, at all levels, to join you in this self-assessment of your own CRM Program.

If your score is:

186-255: Implementing a CRM Results Measurement System is most likely to succeed. Focus resources on responses that received "ones and twos" to accelerate the implementation process.

115-185: CRM Results Measurement is possible, but may be difficult to implement. Bring your scores up to speed before attempting to implement the ROI Results Measurement System.

51-114: Implementing change will be virtually impossible without great difficulty. Focus instead on (1) building change readiness in the dimensions above and (2) affecting change through pilot or beta programs that are separate from the overall organization.

Questions

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Readiness Scoring

How to score: HIGH = 5 points; MEDIUM = 3 Points; LOW = 1 point

Description	Score
We already use CRM performance measures of the sort encouraged by the total quality management approach (order cancellation rates, order fulfillment cycle time, etc.) and these express the economics of the local government.	
Our executives are NOT rigidly turf conscious and are willing to measure critical processes and be accountable for the success of the CRM initiatives.	
We have a continuing program that objectively compares our company's performance with that of competitors and systematically examines competitive trends in our market.	
Everyone involved in the implementation of CRM knows who the customer is, knows their needs, and has direct contact with them.	
Our organization has successfully implemented a Results Measurement Program in the recent past.	
We collect measures linked to organizational improvement goals.	
We define our measures from the customers' "point of view."	
Our measurement system does not focus solely on "bottom-line" financial results.	
This organization uses measurement data to promote continuous improvement and learning.	
Our measurement system does not generate more paperwork than is necessary.	
Our measurement system always gives us the information we need when we need it.	
Our measurement system focuses on continuous improvement rather than compliance and control.	
We are only accountable for measures for which we have control.	
Our measures focus on the "positive" side rather than the "negative" side (e.g., appointments met versus appointments missed).	
Our measurement system contains both objective and subjective measures.	
Everyone understands the measures used to evaluate performance.	
Managers or employees are accountable for measurement accuracy and results.	
We act on measurement results quickly.	
All data collection methods are cost-effective.	
We always communicate measurement results to the appropriate managers and employees.	
Our measures focus on effectiveness (e.g., number of on-time shipments) and efficiency (e.g., response time).	
Measures show change when we make improvement efforts.	
We have a method for screening out measures that we really do not use.	
Our measurement system contains a "well-balanced" blend of key result areas that reflect our mission, vision, and strategic goals.	
Our measurement system provides information that allows us to set clear objectives.	
Objectives are based on a clear understanding of the performance capability of our systems and processes.	
Important work that crosses functions gets measured and does not "slip through the cracks."	
We gather data automatically (e.g., does not require extra manual labor) whenever appropriate.	
Data is gathered close in time to the performance event (e.g., recorded immediately rather than two weeks later).	
We link process measures to citizen's requirements.	
The method to communicate measurement data to employees is very effective.	
We review measurement data at management meetings and we take quality improvement actions.	
Data is presented graphically to help identify important trends.	
We measure citizen satisfaction for each department's performance.	
We measure employee morale and job satisfaction systematically.	
Citizen satisfaction measurements capture key information that accurately reflects their preferences.	
We continually evaluate and improve our measures and the methods used to collect and report performance data.	
We pay as much attention to the "non-financial" measures as we do to the financial measures.	
The organization is committed to a process of continuous improvement.	
Collaboration across internal functions is viewed as a key to effectively serving the market.	
Ability of the organization to adapt to changing market conditions is key to long-term success.	
Incident reports are tracked within the system, shared with other departments, and the metrics are visible to the organization's senior management.	