Column: **You Betcha**

Title: **The Insanity of CRM Planning**

Subtitle: *Freud knew we were going to do it wrong.*

Author: Dick Lee

Among my favorite quotes is Freud's definition of insanity: "Doing the same thing over and over again but expecting a different outcome." He must have been thinking ahead to CRM. Sure 'nuff. While we continue to yak about "customer-centricity"—the underlying goal of CRM—we rarely attain this state because we keep trying to develop customer-centric strategies using traditional planning tools designed to produce traditional, *company*-centric strategies instead. And that's what we get.

So why do keep doing this? Because we keep forgetting to switch planning tool boxes? Unfortunately, it's not that simple. What I've learned the hard way, beating my head against brick walls on this one, is that old planning habits die hard. Especially in the absence of visible alternatives. So what better use of this column than making visible several principles that will help convert your planning outcomes from company-centric to *customer*-centric.

- *Customer-centric planning does not start with setting goals and objectives.* Instead, goals and objectives are an outcome of the planning process.
- *The planner's "world view" is shaped by what customers see.* Rather than expressing the seller's perspective, then determining how to make buyers' adopt that perspective, the planning process establishes the buyer perspective first, then determines appropriate seller response.
- *The focus of planning is determining how best to create value for customers, not how to enrich the company.* Customer-centric planning shares the same root concept as Six Sigma. The only way to create value for the company is to first create value for the customer.
- *Identifying win-win opportunities with customers is the primary achievement of planning.* Identifying objectives and strategies built around these opportunities is the easy part.

If you're serious about developing *real* CRM strategies, following these principles will help you get there. You betcha, it will.

Dick Lee is Vice President of Minneapolis-based consulting firm Caribou Lake and heads its Customer-1 practice, which specializes in helping clients achieve customer-centricity. Dick is the author of two seminal CRM books—Strategic CRM: the complete implementation manual *and* The Customer Relationship Management Survival Guide. *He also speaks internationally on CRM topics. You may reach him at dlee@cariboulake.com or visit the Caribou Lake website at www.cariboulake.com.*