HealthForceOntario

Recruitment Essentials

Customer Relationship Management

Ontario

HealthForceOntario Marketing and Recruitment Agency

Table of Contents

Customer Relationship Management (CRM) Overview 1

Defining customer relationship management 1

Planning first steps 1

Relating to your clients 1

Deciding when to communicate 2

Ensuring a positive contact experience every time 2

CRM software support 2

Choosing your software 2

Questions to ask before you invest in CRM software 4

Customer Relationship Management (CRM) Overview

Defining customer relationship management

While a mainstay in business language, customer relationship management (CRM) is a complex term for some. Customer relationship management (CRM) consists of a system to acquire and retain current and prospective customers.

As a physician recruiter, you are already a customer relationship manager; you just might not realize it. For example, upon returning from a recruitment fair, you could sort and enter potential candidates' names into a database. Then, send a personalized, introductory e-mail to each candidate. In a few months, you could send a follow-up e-mail with specific information of interest to the individual—perhaps outlining a community site visit or local event.

These are all steps in the customer relationship management cycle.

Planning first steps

As a recruiter, you are often a candidate's primary contact in the search for an ideal practice location (a single point of community contact for physician recruitment is ideal). Your professionalism, listening skills, availability, responsiveness and reliability all factor into his or her "level of satisfaction". The following objectives will show you how to build an effective CRM system and turn your client's level of satisfaction into a success story for you.

- Develop and nurture relationships with individuals you view as important to your recruitment and retention efforts. These can be external or internal individuals or organizations. Understand their strengths and weaknesses.
- Know your customers/clients and their families. Your clients may be physicians, recruits or health-care stakeholders. Remember these individuals bring their own set of motivations to the recruiter/physician relationship. Deliver outreach efforts that serve the interests of both parties and create mutual benefits.
- Remain in positive and continuous communication, delivering content that is tailored, meaningful and proactive. Choose communication tools preferred by your client: for example, conventional letter, telephone, in-person, fax or e-mail.
- Become a trusted resource. Always address a customer query in a timely manner. Be consistent in maintaining high-service standards, treating internal contacts the same as external contacts.
- Track your CRM activities. Many of today's CRM software packages enable you to track and record the entire history of each of your client relationships, from the first e-mail you sent to the last phone conversation you had to the client's favourite sports and activities. This information allows you to pace your interactions in a proactive way, create personalized, value-added communications, and track the feedback or success of your CRM initiatives.

Relating to your clients

You are ultimately the ambassador to your community and the force behind developing positive and forward-thinking relationships with your physicians, potential recruits and stakeholders. A positive interaction is driven both by *how* and *when* you communicate with your client, whether it be an individual or a corporation. It is within this mix that a communications strategy emerges and a series of positive interactions develops.

Deciding when to communicate

You want to communicate in a way that is:

- Consistent without being overwhelming.
- Regular without being invasive or redundant.
- Respectful of the daily obligations of the client.
- Effective in ensuring the client views you as a positive resource.

Ensuring a positive contact experience every time

After each interaction, your clients should feel that:

- You are a dependable, valuable resource who is committed to their success.
- Interactions are positive, honest and have the best intentions.
- You each recognize the benefits of a long-term relationship.

CRM software support

CRM software lets you enter, retrieve, track and evaluate customer data and interactions. For example, you may enter data such as community visits, face-to-face conversations, personal details and beyond. Through your software's capabilities, you should be able to transform these experiences/data into a continuum that lets you evaluate your interactions to date. From here, you can develop/tweak your communications strategy going forward, informed by past CRM activities and successes.

Choosing your software

The marketplace offers many software choices. Some focus on one aspect of the relationship cycle while others are more comprehensive. Further research is key to purchasing a product that meets the needs of you and your team. Here are a few of the choices available:

Filemaker (www.filemaker.com)
Filemaker allows you to create your own databases. Once you create your database, you are able to enter information, search, sort and create reports. Training programs are available to get you started.

IBM Notes (www.ibm.com/software/products/us/en/ibmnotes/)
IBM Notes is an advanced e-mail, calendaring and contact management system. You can maintain a variety of personal and professional data, including photographs, for a contact and organize the information in related groups and categories.

Microsoft Access (www.microsoft.com/access)
Microsoft Access allows you to create databases to track your interaction with clients. This method is very cost effective and is one of the more popular ways to track CRM. If you are new to Access, there are templates available at no cost on the Microsoft website to help you get started.

Microsoft Excel (www.microsoft.com/excel)
Excel is another cost-effective way to manage and organize your CRM. It allows you to easily sort, filter and create pivot tables to track your communication with clients.

Microsoft Outlook (www.microsoft.com/outlook)
Outlook is well known as an e-mail program but it can also be used to track your communication with clients. Outlook allows for CRM tracking through e-mail, tasks, calendar and contacts.

Microsoft OneNote (www.microsoft.com/onenote)
Microsoft OneNote becomes your personal go-to notebook where you can gather notes, links, web pages, photos and videos. OneNote also allows you to insert an Excel spreadsheet to get a preview of charts and diagrams right next to your notes, as well as create tables and charts with ease.

Outsource
This is a software program specifically designed for CRM. There are many companies that will build a system to your specifications. The cost of these programs varies, depending on your needs. A few companies to contact include:

Amdocs: www.amdocs.com Infor: www.infor.com Oracle: www.oracle.com	Salesforce: www.salesforce.com SAP: www.sap.com

Paper Files
Though not as effective or efficient as software, paper files can still be used for CRM. Be sure that your files are up to date and accurate as well as easily accessible.

Questions to ask before you invest in CRM software

- How will this software serve your recruitment and retention goals?
- What will it allow you to do? In your opinion, is it good value?
- Will your new system allow you to maintain all customer information in a consolidated way? Is it a one-stop shop or will you have to visit various sources/applications to see a complete picture of your customer in terms of past, present and future?
- Will your system allow you to enter comprehensive information such as primary and secondary contact information? Or notes for each contact experience?
- Will your system tell you when it's time to reach out to a particular stakeholder or individual?
- Will your system allow for reporting or projecting capabilities? Will it allow you to view contact activity on a variety of levels, such as within a single organization or across an entire sector? Will your system allow you to see daily, weekly, etc., requirements in terms of whom to contact and how?
- Make sure your system makes it easy to input data. Is it designed to keep user workload to a minimum? As a user, can you be both regular and consistent in when, what and how you enter information?
- Can you access the information quickly and easily within your system? Will it support situations where immediate decisions, information retrieval and data manipulation are required?
- Can multiple users access your CRM platform? Will your system provide sharing or conduit capabilities? Can you deliver information—either raw or processed—within your organization that lets other parties make informed decisions?
- Will your system allow and/or encourage you to engage your customers in a way that is tailored, proactive, meaningful and visionary?
- Ultimately, does your system allow you to:
  - Track, evaluate and manipulate activity information in a way that supports the objectives of you and your organization?
  - Initiate, develop, maintain and nurture relationships in a way that is continuously and positively evolving toward supporting the objectives of your organization?

For more information or questions, please contact your local Regional Advisor:

www.healthforceontario.ca/ra