

Development Of A Client Loyalty Plan In The Company Cda Automas Ltda Through A Crm

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Abstract : Currently, the CRM or customer relationship management is considered as a technological support tool for companies, since it allows them to combine strategies and processes based on the information of their clients, to use it as an important mechanism that mainly helps to know and segment their customers. The purpose is to determine the aspects that must be taken into account for the development of a client loyalty plan in the company CDA Automas Ltda. Data considered was initially provided by Mr. Milton Cesar Posada Melo, administrative manager of the company, who provided all relevant information. Subsequently, a diagnosis is made to know the perception of the internal customer about the business management and to know the perception of the external customer regarding the quality of the services offered by the company. Results of the study allowed us to identify the necessary aspects to design a strategic CRM plan for the internal customer, that proposes the development of strategies oriented towards the human resource, as a starting point to achieve the corporate objectives and thus contribute to improve the customer service quality and a strategic CRM plan for the external customer, which proposes the development of a procedure for requirements attendance applicable to CRM, in order to reduce the occurrence of problems and thereby increase clients satisfaction. In accordance with this, a support tool was created to allow the company to adequately meet the expectations and needs of its internal and external customers and improve the performance of the organization through the active participation and commitment of all employees. Finally, a budget of economic feasibility was presented and an approach was made with the board of directors where it was determined that the implementation of the CRM was viable.

Keywords: Strategic, CRM (Customer Relationship Management), internal customer, external customer, diagnosis.

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I. INTRODUCTION

Every company considers important to have good relations with their clients, because in one way or another they are the reason that their products and / or services continue in the market; in all industries the loyalty and recognition of the clients is sought, in such a way that it identifies the company as the best alternative.

Despite the fact that the CDA Automas Ltda has a privileged position and category within the automotive sector, it constantly faces different problems that are due, among other factors, to its large volume of services offered and its continuous growth. Accordingly, aspects such as: shortcomings in the services and attention provided, deficiency in the quality of the information, dissatisfaction in the reports delivery times; among others, produce repeated customer complaints related to the services offered, which significantly deteriorate the image of the company, causing significant problems at the corporate, administrative, legal level, destabilizing the integrity of the company and risking its permanence in a highly competitive market.

In accordance with the above, through the development of a customer loyalty plan, we seek to improve the quality of customer service in the company, a support tool was created that allows the company to adequately meet the needs and expectations of its internal and external customers, in order to improve the performance of the organization through the active participation and commitment of all employees, making this attitude a factor that prevails in the effective achievement of a quality customer service.

For this reason, the main aspects that compose the strategic planning system are identified, as well as the main elements that constitute the customer service, as well as the concepts related to the CRM (Customer Relationship Management).

Consecutively, a diagnosis is made to know, at first, internal customers opinion about business management and secondly, external customers opinion regarding the quality of customer service offered by the CDA Automas Ltda. These results allowed us to identify the necessary aspects to develop a strategic CRM Plan

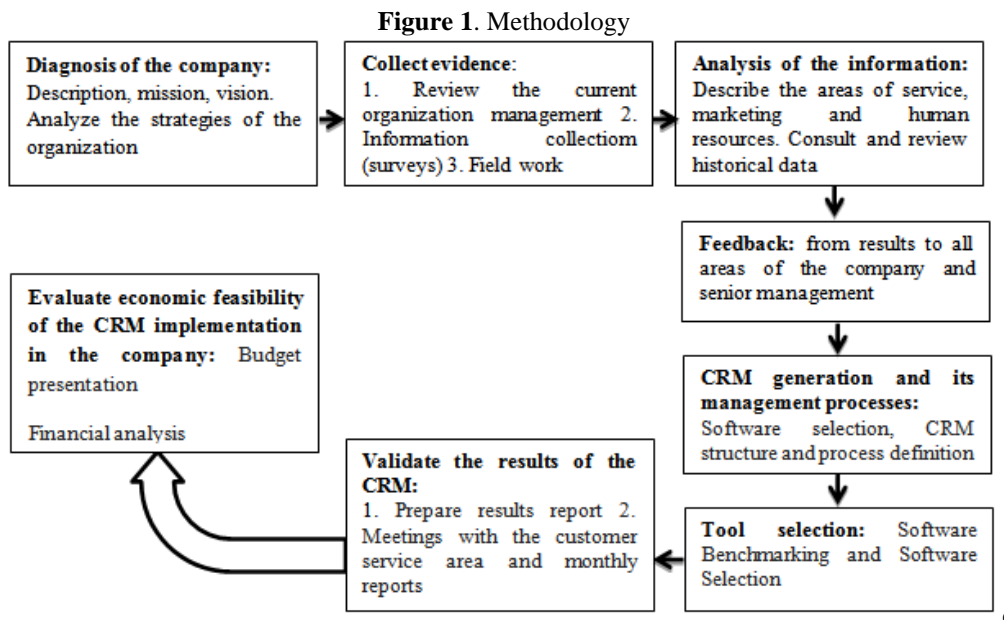
both for the internal customer and for the external customer, as a point of support to improve administrative management and operational effectiveness in the quality of customer service.

Therefore, through the design of a strategic CRM Plan for the internal customer, the development of strategies oriented towards the human resource is proposed, as a starting point to achieve the corporate objectives and thereby contribute to improve the service to the client. On the other hand, through the design of a strategic CRM Plan for the external customer, it is proposed to develop a procedure to attend requirements applicable to the CRM, in order to reduce the occurrence of problems and thereby increase CDA Automas Ltda customer satisfaction. The necessary requirements for the development of the customer loyalty plan in the company CDA Automas Ltda are identified through a CRM. [1]

Finally, the budget and implementation plan is established, in order to determine the viability of the execution of the strategic CRM (Customer Relationship Management) plan in the company. With the implementation of the customer loyalty plan, an organizational change is evident in order to take advantage of the opportunities available to customers and a new way of working.

II. METHODOLOGY

Figure 1 describes the steps to follow in the development of a customer loyalty plan through a CRM, presenting a work methodology that facilitates the analysis of the information obtained. [2]



Source: Autores, 2018

The CDA Automas Ltda company, clearly identified its current clients, as well as their requirements in a particular way and their disagreements about the service received. In this way, the company has information that allows to improve its services and adapt its processes according to each client needs and specific requirements.

Additionally, company can identify the areas that needs to improve to provide adequate customer service, improve the post-sales service and ensure the availability of sales consultants to address the customers doubts and suggestions.

III. Crm Generation And Loyalty Plan

The main objective of the implementation plan is to match the CRM strategic plan in the current management systems, in order to create connections between the development and formulation of the strategy, generating positive results in the company [3]

Within this context, the implementation of the CRM strategic plan in the CDA Automas Ltda company, will be a continuous process, which will be carried out in different phases, applying a careful methodology that allows to evaluate step by step the results obtained in the implementation and proactively act when changes occur [4]. (See fig 2)

Figure 2. CRM structure



Source: Autores, 2018

For the CRM generation, the set of tasks and activities were identified, which allowed the proper implementation of the CRM strategic plan and involves the application and development of activities aimed at mobilizing the company to the new management system.

3.1 CRM strategic approach

To achieve the correct implementation of a strategy based on the CRM tool in order to retain customers, different aspects must be taken into account [5]:

3.1.1 Definition of relevant customer data: The first aspect is essential to clarify the most important information for the company, define the data that provide opportunities for growth and knowledge in a way that encourages its development.

When referring to the characteristics and conditions that customers have, the specific data that the company needs to feed its CRM database is established, and in this way, the analysis and loyalty strategies are subsequently carried out. The information of each service that a client requests will be registered on the system and will be available to download and make its subsequent analysis. Customer data can be obtained in several ways, among which stand out [6]:

- Information provided by the client
- Information provided by the commercial executive
- Information acquired through email
- Information acquired through the RUNT platform
- Telephone attention

All the data obtained will be entered in a reliable information base, which will be located in the company computers and servers. Users can remotely register additional data, considering the assigned permissions. See fig 3.

Figure 3. Client interface

Source: Autores, 2018

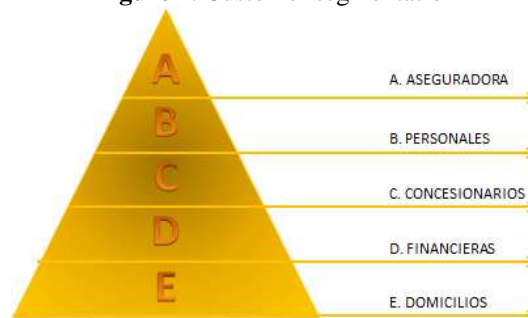
As can be seen in Figure 3, the design of the interface is directly influenced by a traditional web application, which was developed in Microsoft Excel, which makes it quite friendly, with a modern but simplistic aspect. The forms are very easy to fill out, writing in the precise field for the requested information.

3.1.2 Customer experience: Based on the different points of contact that the client can have with the company, different ways of acting are generated, all in order to interact in the best way to understand the interrelationships that exist and how customers feel when interacting with the company [7]

3.1.3 Capture the information adequately: For the company it is very important to have the real and correct information of all its clients. Commercial executives, logistics operators and call center operators have a great responsibility to be direct contact with customers, who provide them with all the information that must be entered in the tool [8]

3.2 Identification of customer loyalty plan: For the company, its customers have been segmented for their value, and based on this, marketing techniques have been established that are appropriate for the different types of customers the company has [9] (See Fig 4).

Figure 4. Customer segmentation



Source: Autores, 2018

For each type of client, it is necessary to have a management technique, that is why it is important to have a segmentation of clients, because according to their knowledge, it focuses on the efforts that must be made, making the most of the knowledge and management of the relationship with their clients. customers. The main focus of CDA Automas Ltda is to retain and maintain its main customers, however every time the opportunity to attract new customers is presented they take advantage of it; but for the company it is much healthier to hold onto its best clients to earn more money [10]

3.2.1. Motors of the loyalty plan according to the customer's experience: Based on the different points of contact that the client can have with the company, different engines are generated based on their experience, all to interact in the best way and understand the interrelations that they exist and how they feel when interacting with the company [11]

- Personalized treatment: With the information that has been obtained from the clients and their profiles, both individually and by segments, the appropriate treatment for each one differs, taking into account the services required according to their needs.
- Effective communication: Reference is made to the use of technology, given that it is intended that at the exact moment that customers need to send their different requirements to the company, they can also make them through emails, and even through networks social.
- Acting in real time: Taking advantage of technology as a point of contact for better management of customer interactions and the sending of information.
- Security and agility: Taking into account the needs of each client, mechanisms are established to guarantee the validity of each service, in the case of mechanical technical review, which is established by law and is mandatory compliance.
- Client follow-up: Communication with users, reception of opinion about the service provided; these data will be to continue improving internal business processes. Contact the customer directly in a post-sale service, seeking to guarantee total customer satisfaction in the purchase process, ensuring knowledge of the customer experience.

With the full identification of the types of clients, or of the main clients, the company is expected to generate campaigns aimed at a specific segment, defining specific and organized programs for each client. (See table 1).

Table 1. Campaigns

| TYPE OF CLIENT | CAMPAIGN | RESPONSIBLE | DESCRIPTION |
|---------------------|------------------------------|----------------------|--|
| INSURANCE COMPANIES | Delegated inspection | Business Advisor | The delegated inspection campaign will be enabled for the insurance companies, and consists of carrying out the insurability inspection through the APP enabled by the company, in order to avoid that the client has to go to any of the offices to take the service , and thus avoid the congestion of vehicles in each of the company's headquarters. Only applies for the inspection service |
| PERSONAL | Remembrance Plan | Call Center Operator | The call center operators will be in charge of managing the information registered by the clients, regarding the expiration of their products. This will be done by sending emails, text messages and finally telephone contact. Applies to the mechanical technical review service and SOAT |
| PERSONAL | Schedule your appointment | Call center Operator | El operador call center se encargará de agendar citas a los clientes que soliciten el servicio de revisión técnico mecánica y emisiones contaminantes, éstas serán agendadas en los horarios valle, con el fin de optimizar tiempos y recursos |
| PERSONAL | Discount plan Other services | Call center Operator | The call center operator will be in charge of scheduling appointments to clients who request the service of mechanical technical revision and polluting emissions, these will be scheduled in the valley hours, in order to optimize times and resources |
| DEALERS | Mobile Unit | Business Advisor | The commercial advisors will be responsible for coordinating the visit of mobile inspection units to the concessionaires that guarantee a certain number of daily services, in order to carry out the immediate delivery of reports and thus speed up the resumption of the vehicles |
| FINANCIAL COMPANIES | Incentive Plan | Business Advisor | For the executives of the financial institutions, an incentive plan (commissions) will be established according to the number of vehicles referred. This applies for expert services |

3.3. Incentive plan and loyalty campaigns

CDA Automas Ltda has identified its main clients and in collaboration with it they have decided to manage different programs and incentives that promote their loyalty [12]:

- **Reminder plan:** Thanks to the information provided by the RUNT platform, the company will send information on the expiration of the products of each client, both the expiration of the mechanical technical review and the mandatory insurance - SOAT. The information will be sent via email 30 days before the expiration of each service, after this will be reported via SMS 15 days before and finally, the customer will be contacted via phone to ensure the delivery of information and generate a personalized service
- **Plan your appointment schedule:** Taking into account the availability of time of the clients, a scheduling service will be offered, which consists in scheduling a prior appointment for the provision of the mechanical technical review service, appraisal and / or commercial appraisal in a specific day and time. The client will not have to stand in line or wait for the attention shift, it will be attended immediately according to the appointment information
- **Home service:** Due to the inconveniences of mobility, an address service will be offered, this consists in coordinating with the customer the pick-up of the vehicle at a specific point, it will be carried out to perform the service of mechanical technical revision, appraisal and / or commercial expertise, subsequently the vehicle will be taken to the point where it was initially collected. This service does not generate any additional value and will be covered through liability policies, in order to ensure the peace of the customers and the safety of their vehicles
- **Discount system for other services:** For customers who take mechanical technical review services and / or mandatory insurance - SOAT will be granted discounts on other services of the company, such as

paperwork, appraisals and / or commercial appraisals, which may be redeemed for the vehicles of your property.

- National coverage: Campaigns and services apply in each of the cities where the company has its own headquarters for the provision of the services offered

3.4. Management processes for the implementation of the loyalty plan [13]:

Once the main clients of the company have been identified, the parameters for recording and capturing the information were established.

- Client registration: To manage clients, the tool will have a list of fields, which must be completed according to the information requested. This information is: Badge, document, name, city, address, telephone, cell phone and e-mail.
- Vehicle data: Once the customer registration is made, the logistics operator must fill out the vehicle information, which will be extracted from the vehicle's ownership card. This information is: License plate, type of customer, service, type of vehicle, type of service, brand, model, date of registration, expiration date mechanical technical revision and mandatory insurance due date – SOAT
- Information management: All the data obtained will be entered in a reliable information base, which will be located in the computers and servers of the company and will be managed by the call center operators through the different campaigns that are established for each customer (14)

IV. Economic Feasibility Of Crm Implementation In The Company

The part that usually pays more attention during the study of economic viability is cost analysis. Your conclusions will be decisive for the management to make the decision to implement or cancel the CRM. In order to obtain the economic viability of implementing the CRM in the company, price quotes were made, corresponding costs of operation, maintenance and total investment.

Table 2 was constructed, with the financial data related to the initial investment required for the implementation and operation in a period of 6 months, some of these data have been projected:

Table 2. Implementation and operation costs

| DESCRIPTION | QUANTITY | VALUE (UNIT) | GRAND TOTAL |
|-------------------------------------|----------|--------------|----------------------|
| Development Cost (Application) | 1 | \$ 1.500.000 | \$ 1.500.000 |
| Computation equipment headquarters) | 2 (1 | \$ 1.600.000 | \$ 3.200.000 |
| Training (Time) | 8 | \$ 35.000 | \$ 280.000 |
| Personal (Call Operator) | 6 | \$ 925.148 | \$ 5.550.888 |
| Comisiones | 6 | \$ 300.000 | \$ 1.800.000 |
| Mobile phone and SMS | 6 | \$ 69.000 | \$ 414.000 |
| Other equipment | 1 | \$ 114.000 | \$ 114.000 |
| TOTAL | | | \$ 12.858.888 |

Source: Autores, 2018

In relation to the initial costs of implementing the CRM, the cost of development (application), the necessary equipment for the start-up and the training of the team that would intervene in the project were taken into account. For operating costs, the costs of the cellular plan and the hiring of a new member (call center operator) for a period of 6 months were considered, the minimum salary was projected for the year 2019 and variable commissions, which would be established according to the number of services provided by its management

4.1 Return on investment [15]

To carry out the analysis of the return on investment (ROI), the deferred project costs were taken into account in 6 months. The number of services provided by each site is approximately 4500 per month. In the project costs, the contracting of 1 call center agent was taken into account, which must have an effective 10% over the total of the services provided month by month.

The average income of each service is \$ 161,880 and the average cost of each service is \$ 97,128

Table 3. ROI investment return

| Miont | January | February | March | April | May | June | TOTAL |
|---------------------|----------------|-----------------|--------------|--------------|--------------|--------------|----------------------|
| Project cost | \$2.143.148 | \$2.143.148 | \$2.143.148 | \$2.143.148 | \$2.143.148 | \$2.143.148 | \$12.858.888 |
| Service Cost | \$38.851.200 | \$42.736.320 | \$40.793.760 | \$56.334.240 | \$39.822.480 | \$51.477.840 | \$270.015.840 |
| Income | \$72.846.000 | \$72.846.000 | \$72.846.000 | \$72.846.000 | \$72.846.000 | \$72.846.000 | \$437.076.000 |
| ROI (\$) | \$31.851.652 | \$27.966.532 | \$29.909.092 | \$14.368.612 | \$30.880.372 | \$19.225.012 | \$154.201.272 |
| ROI (%) | 78% | 62% | 70% | 25% | 74% | 36% | 55% |

Source: Autores, 2019

From this, it can be analyzed that the implementation of the CRM in the company has a good economic viability, compared to other commercial strategies that require a greater investment, such is the case of the purchase of a vehicle to perform services at home, which will require the acquisition of an asset and the hiring of a driver, the above justifies making the investment, which despite being high in the beginning, may consider obtaining profits during its operation, thanks to the financial performance it provides, the quality, efficiency and durability of the technology, which among other aspects, allow to rectify the viability of the project, since the economic favor is perhaps one of the most solid aspects for its presentation and acceptance [16]. Likewise, it can be replicated in the other company headquarters.

V. Analysis

A customer loyalty plan was developed in the company CDA Automas Ltda through a CRM. This study provides a better understanding of the background and results of the use of CRM tools and examines their performance through the capacity of data management and the ability to respond to the client. Several points are worth mentioning: First, the results of this study show that the use of CRMs plays an important role in the competence of new information technologies. Given that it is likely that companies with greater use of these tools achieve greater value, the results imply that a high use of CRM is associated with better performance. Previous studies that focus on a direct relationship between IT competence and business performance using CRM tools do not take into account the true facilitators of performance improvement. By using CRM, it is confirmed that actual use is the important link between profitability and performance Devaraj and Kohli, 2003 [17].

In addition, the client's response capacity partially mediates the relationship between the use of Business Analysis and the performance of CRM Roberts and Grover 2012 (18), found that the effectiveness of the action is greater when the client's detection capacity is high. and the client's response is average when both capacities are high. This finding reveals that the customer's response does not translate into a continuous increase in CRM performance. Interviews were conducted with the personnel in charge of the business analysis to find out why the response time does not have a greater influence on performance. One reason is that the process may be delayed due to reports to management to reflect the perception of the management strategy. The customer service staff admitted that this trend is more severe, especially when a large investment based on the knowledge gained through a CRM is needed. Another explanation would be that the attempt to reflect the needs of the client in real time leads to a reduced operational stability. Frequent changes in the system to respond quickly to the needs of customers can increase the possibility of errors.

Some companies deliberately abstain from the service in real time, although they can afford a real-time response to customers. These reasons explain why the response capacity partially mediates the relationship between the use of business analysis and CRM performance. [18]

The result shows that the data management capacity completely mediates the relationship between business analysis and the use of CRM. The ability to manage data is important, since the analysis begins with data management. Companies with excellent data management confirm that data management capacity is an essential capability for the use of CRM. If companies have less reliable data, the results through the analyzed data are less reliable. When data from different systems are not integrated, the agility of the analysis is less expected due to the longer preparatory period. Companies that consider CRM to be the core competency of their organizations are already planning to integrate data from specific data sources before moving on to analysis.

With the implementation of the customer loyalty plan through the CRM, the aim is to have a great impact on future relationships with each client, as well as the competitive advantage that this provides. In the development of the CRM, it must be clear what elements are fundamental and which aspects are the most relevant for each company, unlike business analysis, in this case what you are looking for is a collaborative CRM where you have a close relationship with customers, and that they contribute both to the company, and the organization to them; for the realization of this is not necessary technology of last generation, much less a large investment, mainly requires commitment to the company and staff training.

VI. Conclusions

The diagnosis made it possible to establish through the surveys made to the internal and external customers that the majority of the population studied has a good concept regarding: The quality of the information received and the delivery process of the reports; why they say they are satisfied with the services offered by the company. However, it is noted that most of them have had to request some kind of repair or re-inspection, stating their disagreement regarding the corrective actions and the steps to be followed to achieve said repairs in the after-sales service.

Through the development of the customer loyalty plan, the quality of customer service was improved in the company CDA Automas Ltda, through a support application that allows the company to create mechanisms to meet the expectations and needs of its customers. internal, as external; In addition to improving the performance of the organization through the active participation and commitment of all its employees and thereby contribute to the increase in the quality of customer service.

The flexibility of the CRM strategic plan allows adapting it practically to all the situations of the organization; This is how its implementation in the company in the customer service department showed the benefits of the system and was generated as a pilot test for the directives, so that in the future it could be generalized in all the departments of the organization.

The economic feasibility study shows the costs analysis, in which a significant increase in profits could be evidenced, which generates a competitive advantage for the company and the analysis of the ROI in relation to other alternatives that the organization had, demonstrates that the implementation of the C RM is the best option the organization has in the short time.

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