



**CRM AND NATIONAL SECURITY  
FIVE ESSENTIAL SOFTWARE CAPABILITIES FOR DOD/IC  
ORGANIZATIONS**

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# CRM AND NATIONAL SECURITY

## Five Essential Software Capabilities for DoD/IC Organizations

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## EXECUTIVE SUMMARY

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Department of Defense (DoD) and Intelligence Community (IC) organizations are under tremendous pressure today. This country is engaged in a momentous struggle that requires intense levels of activity and/or readiness to address a wide range of global threats to its security. As a result, DoD/IC organizations must diligently manage and support large numbers of people performing a diverse range of critical tasks around the world. Adding to this challenge is the fact that this management and support must be accomplished within very tight staffing, budget, and technology procurement constraints.

The people that DoD/IC organizations must manage and support include active-duty personnel, their families, reservists, recruits, retirees, contractors, staff at other organizations, and the general public. These men and women are, in essence, the “customers” of the organization.

To manage and support these customers in a manner that is both highly effective and highly efficient, DoD/IC organizations require several essential capabilities including:

- The ability to collect and maintain diverse types of institutional knowledge
- The ability to make knowledge available to customers 24x7 via web self-service
- The ability to quickly interact with customers across all communication channels—including phone, email, web, chat, and fax—and to ensure that customers get consistent answers regardless of how they communicate or who they communicate with
- The ability to automate workflows for case management, program enrollment, and other core business processes
- The ability to assess organizational performance based on both objective metrics and subjective feedback from customers

These capabilities align directly with those provided by customer relationship management (CRM) software. In fact, when properly adapted to the requirements of DoD/IC organizations, CRM software uniquely enables those organizations to meet many of the challenges they face under today’s complex global wartime conditions.

Of course, DoD/IC organizations have requirements beyond those of private-sector CRM users. These include more stringent security, support for certification and accreditation processes, and integration with legacy systems. So, in addition to evaluating the functional capabilities of CRM software, DoD/IC managers must also ensure that their CRM software and solution provider can satisfy these key implementation requirements.

RightNow is such a software and solution provider. RightNow provides robust, highly adaptable CRM solutions that are used by multiple DoD/IC organizations to optimize customer management and support, while significantly reducing costs. RightNow also provides the professional services DoD/IC managers need to ensure timely, reliable achievement of their project objectives. By leveraging RightNow software and services, DoD/IC organizations can overcome real-world resource constraints to fulfill their missions with excellence.

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## MANAGING RELATIONSHIPS UNDER PRESSURE

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DoD/IC organizations are presently under intense pressure to effectively manage relationships with their customers. There are several reasons that this pressure has become particularly intense. These reasons include:

### Personnel under pressure

DoD/IC personnel are currently under tremendous personal pressure. Many of them are facing difficult conditions in the field every day. Others are about to face those conditions or have recently done so. People operating under these types of stresses have little time or patience for clumsy administrative processes. If they have a question or a problem, they need it addressed immediately and reliably by those who are entrusted with management and support tasks. Swift, effective communications are therefore essential for optimizing morale and ensuring the ability of people to function in critical situations without distraction.

### A dynamic, globally dispersed customer population

Unlike private-sector companies, DoD/IC organizations do not have a customer base that lives in the comfort of their own private homes or apartments. Nor are DoD/IC customers restricted to the handful of domestic U.S. time zones. Many are deployed on the other side of the world. Many live in barracks and/or do not have a fixed address. So an organization's ability to meet its customers' information needs is contingent to a large degree on the maintenance of 24x7 communications via whatever channel is most convenient for the customer at any given time—which, more often than not, is the web.

### Processes that can be both critical and complex

DoD/IC processes are not always simple, but they can also be very critical for both the organization and the customer. DoD/IC organizations must therefore make every effort to make sure that these processes—whether it's a soldier attempting to secure benefits for a family member back home or a potential contractor trying to clarify the terms of a contract out for bid—are not derailed by error, delay, or neglect. This means that such processes must be fully trackable and that organizations must be able to provide customers with all the information they need to appropriately fulfill their responsibilities in those processes.

### Mission fulfillment and accountability

To fulfill their missions, DoD/IC organizations have to take care of their people. They also have to be able to demonstrate to those with oversight that they are taking all reasonable steps to provide that care. This means that they must be able to assert with some degree of credibility that they are 1) delivering appropriate levels of customer care, and 2) proactively detecting and remediating issues which may potentially compromise the quality of care they are able to deliver. Organizations must therefore implement the technology and best practices necessary to both achieve and document their performance levels in regards to customer care.

### The imperative to “do more with less”

DoD/IC organizations do not have unlimited financial or human resources with which

to address customers' needs. In fact, in many cases, those needs have escalated well out of proportion to increases in funding. Those in charge of customer-facing processes must therefore make a special effort to increase the efficiency in which people's needs are met. These efficiencies are typically sought through a combination of process automation, more effective use of online channels, enhancements to support-staff productivity, and greater visibility into care-related performance metrics.

These are just some of the underlying issues that are putting pressure on DoD/IC organizations to seek significant improvements in the way they interact with their customers. These improvements are not only necessary for meeting today's national security challenges—but also for ensuring that DoD/IC organizations are positioned to meet the new and possibly greater challenges they will face in the future.

## **FIVE ESSENTIAL CRM CAPABILITIES**

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While the pressures being exerted on the relationships that DoD/IC organizations have to manage may be quite intense—and the various processes and issues associated with those relationships may be highly complex—the specific capabilities necessary to cope with those pressures and complexities are fairly straightforward. In fact, there are five core capabilities that have proven to be particularly useful for DoD/IC organizations seeking to fulfill the day-to-day needs of their customers with optimum effectiveness and efficiency. They are:

### **1) Collect and maintain diverse types of institutional knowledge**

To provide people with the answers they need, DoD/IC organizations need a common knowledge foundation where all of those answers can be easily found. This has historically been a challenge for DoD/IC organizations, because institutional knowledge can be so diverse and is typically distributed across many different areas of the organization. An effective knowledge foundation allows these different areas to continue “owning” the various types of information for which they are responsible (including policies, application forms, customer histories, etc.). But it nonetheless provides a single point-of-access through which all information can be discovered, distributed, updated, verified, and managed.

### **2) Make knowledge available to customers 24x7 via web self-service**

The bottom line for DoD/IC organizations—as it is for so many other organizations in the public and private sectors—is that the fastest and most resource-efficient way to get information to people is web self-service. Effective web self-service empowers people to find the information they need from wherever they are in the world 24 hours a day without assistance from an organization's staff. Thus, it is an absolutely essential capability for serving today's “wired” customers.

Web self-service should include:

- Automatic presentation of the most important pieces of information first. Site visitors must be able to find what they need quickly and easily. So a good self-service system should be able to “learn” from user searches which information they need most and present this information on a “Top 20” list that appears on the main self-service page. This ensures that the greatest possible number of site visitors can find what they need with a single mouse-click.

- Fast, user-friendly search. People who don't see what they need on the "Top 20" list can quickly become frustrated if they then have to sort through lots of content without success. An effective self-service system must therefore offer a highly intuitive interface that includes keyword search, plain-language querying, and topic browsing. It should also use filtering techniques to avoid overwhelming site visitors with too many search results.
- Email pre-emption. Email often becomes a communication bottleneck for DoD/IC organizations. That's because, out of habit, many site visitors simply send an email instead of checking available self-service content. To mitigate this problem, the self-service system should be capable of automatically "reading" incoming emails, determining if any keywords in those emails are associated with existing knowledge base content, and presenting that content to the site visitor in order to pre-empt their email.

### 3) The ability to quickly interact with customers across all communication channels to ensure customers get consistent answers regardless of how or with whom they communicate

The same knowledge base that customers access via self-service should be used by organization staff members who work with customers via other communication channels—including phone, email, web, chat, and fax. This ensures that all of the information provided by the organization is consistent, accurate, and up-to-date.

DoD/IC organizations also need robust tools for managing communications with customers across these other channels. Incoming emails, for example, need to be time-stamped and tracked so that managers can make sure no request for help "falls through the cracks." Emails and/or phone calls may also need to be routed based on business rules to those with the appropriate subject-matter expertise.

In addition, organization staff members will typically need point-and-click access to the information necessary to address each customer's particular issue, including a full history of previous interactions with the customer regarding that issue—no matter what channel the interaction was through. This way, customers can get the help they need even if they speak to different staff members at different times—or if they use email to send a follow-up question about an earlier phone conversation.

### 4) Automate workflows for case management, program enrollment, and other core business processes

Above and beyond tracking individual emails and/or phone calls, DoD/IC organizations must have mechanisms in place for managing the full end-to-end workflows for core customer-facing processes. So if someone applies for a certain benefit, it should be easy for any authorized staff member to see what stage the application is in—and whether there are any active issues that might be holding that application up. Workflow automation can also include capabilities such as automatic notification of a process manager if a certain amount of time passes without an application (or an IT help request or the submission of a formal grievance) moving from one stage to another. These kinds of rules-based workflow mechanisms support fulfillment of service-level objectives and reduce the risk of process failures resulting from human error.

## 5) Assess organizational performance based on both objective metrics and subjective feedback from customers

Organizations that implement web self-service, communications tracking, and workflow automation can also use these capabilities to generate objective performance metrics that can be very useful for further optimizing customer services. These objective metrics can include:

- Self-service effectiveness rates that can be used to improve alignment between posted knowledge and customer needs
- Phone and email response metrics that can be used to pinpoint service bottlenecks and optimize resource allocation
- Staff performance metrics that can be used to discover knowledge shortfalls and possible training needs

DoD/IC organizations should also be able to collect subjective feedback from customers to get their input about where service is satisfactory and unsatisfactory. For example, if customers consistently say that available self-service content regarding a particular subject isn't very helpful, then steps can be taken to correct both that existing content and perhaps the process by which that content is created. On the other hand, if a particular staff member consistently gets high subjective ratings from customers, it might make sense to find out if that staff member is doing something in a way that other staff members can readily be taught to replicate.

Of course, these are not the only technical capabilities DoD/IC organizations need to better support their various customer types. In some cases, for example, organizations may want to implement better mechanisms for proactively distributing news and bulletins to targeted groups of customers. In other cases, organizations will need mechanisms for quickly gathering and posting information relevant to a highly dynamic situation or crisis. The five capabilities described above, however, form the core of what DoD/IC organizations have found to be of most central importance in developing a viable customer service improvement strategy.

What's noteworthy about these capabilities is how closely they map to those associated with CRM software. So, while DoD/IC CRM requirements are certainly different in many ways from those of private-sector companies, an underlying commonality means that such organizations can greatly benefit from the same core technological capabilities. And these capabilities have already been proven to produce significant organizational benefits in the real world.

## **CRM PROCUREMENT AND IMPLEMENTATION FOR DOD/IC ORGANIZATIONS**

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While it's true that DoD/IC organizations must acquire CRM capabilities in order to optimally fulfill their missions, it's equally true that they have to do so in a way that is most appropriate for their particular needs. CRM solutions that are popular in the private sector do not necessarily address these needs. That's why DoD/IC decision-makers should take the following factors into account when planning the acquisition of CRM technology:

### Proven adaptability and/or packaged functionality for DoD/IC requirements

Few DoD/IC organizations will want to invest their own time and effort into “training” a CRM software and solution provider about DoD/IC requirements. Nor do they want to have to invest an inordinate amount of time and effort trying to customize a complex CRM application that is not readily adaptable to specific DoD/IC-related requirements. It’s therefore wisest to acquire CRM technology from a software and solution provider that has reasonable familiarity with DoD/IC issues and that packages its application functionality in a way that makes sense for DoD/IC organizations.

### Established support for the Certification and Accreditation (C&A) process

The software acquisition process for DoD/IC organizations can be complex and exacting. Again, these organizations may not have sufficient resources to allocate to this process. They may therefore expect their software and solution provider to be able to provide effective support for all phases of the C&A process—including, but not limited to, Interim Authorization to Operate (IATO), Authorization to Operate (ATO), and Department of Defense Information Assurance Certification and Accreditation Process (DIACAP).

### Web-based architecture

Effective implementation of the essential DoD/IC CRM capabilities described here is to a large degree contingent on the ability to deliver functionality wherever it’s needed—whether it’s to a contact center staffer at a headquarters location or a content contributor in the field. For this reason, DoD/IC organizations are better served by CRM solutions that use a fully web-based architecture. This approach also makes it easier to quickly extend or shift application access to different users and/or locations as may be required by unexpected changes in conditions on the ground or the geographic location of authorized staff.

### Scalability

DoD/IC organizations don’t always need or want to implement a comprehensive CRM solution all at once. Often, such organizations need to implement specific CRM components first in order to address particularly pressing problems—and then incrementally expand their implementation over time based on a needs-prioritized project plan. An ideal CRM solution will therefore be sufficiently scalable to allow this sort of logically staged implementation.

### Enterprise Integration

DoD/IC organizations often have substantial long-term investments in legacy technology, including mainframe and midrange system databases. Any CRM solution worth serious consideration must leverage Service Oriented Architecture (SOA) fundamentals to provide seamless integration with these legacy systems, as well as other mission-critical systems.

DoD/IC organizations will typically take many other factors into consideration when acquiring CRM technology as well—including cost, ease-of-use, Section 508 compliance, and responsiveness of tech support. These factors, however, are among those that most clearly differentiate DoD/IC CRM implementations from their counterparts in the private sector.

## **CRITICAL ADVANTAGES FOR THE DOD/IC MISSION**

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DoD/IC organizations are balancing multiple priorities and must exercise great care to optimally allocate their technology acquisition budgets to address those priorities. Any investment in CRM technology must therefore be predicated on the expectation of significant, tangible benefits that will exceed those potentially offered by other technology investments.

This is very much the case. The right CRM technology correctly deployed can in fact deliver critical advantages for fulfillment of DoD/IC missions. Those advantages include:

### **Enhanced empowerment of people to fulfill the organization's mission**

If people can't get answers to their questions or have to wait an inordinate amount of time to clarify an operational policy, they can't get their jobs done. CRM eliminates many common sources of delay and confusion—thereby empowering staff to do their jobs more effectively and maintain clear focus on the organization's mission.

### **Better morale**

When you take care of your people, your people take care of you. Because effective implementation of CRM can be so instrumental in maintaining morale, its impact can include improved individual performance, higher re-enlistment rates, and less time spent trying to fix morale-related problems.

### **Reduced administrative costs**

By streamlining a wide range of administrative processes, CRM technology can free budget and human resources for more strategic tasks. These administrative efficiencies can also enable DoD/IC organizations to scale their frontline staffs without having to grow their “back-office” operations proportionally.

### **Risk mitigation**

When people are inadequately informed or get conflicting information, they can make mistakes. These mistakes can potentially have significant consequences in terms of individual performance, IT security, or mission fulfillment. By helping to make sure the right information gets to the right people at the right time, CRM can play a key role in mitigating these types of risks.

### **Supporting organizational accountability**

Every organization has to be adequately prepared to account for its actions in the event it is queried by a legislative committee, the media, or some other authorized third party. A CRM system facilitates this accountability by demonstrating the diligence of the organization's management to institute reliable, standardized processes, as well as creating an auditable record of the execution of those processes.

### **Faster returns on system and program investments**

When organizations invest in a new information system or a new training program, they want the benefits of those investments to materialize as soon as possible. CRM technology supports this accelerated time-to-benefit by ensuring that people can immediately educate themselves about all of a system's or program's particulars.

All of these advantages are critical for DoD/IC organizations seeking to quickly respond to ever-changing global conditions. Fulfillment of mission is ultimately dependent on how effectively and efficiently men and women do their jobs every day. Adaptable, intuitive, and richly functional CRM technology provides essential capabilities for fully empowering these men and women with the information they need to perform to their full potential. The right CRM technology is therefore an indispensable investment for fulfillment of DoD/IC mission.

## ABOUT RIGHTNOW

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RightNow (NASDAQ: RNOW) delivers the high-impact technology solutions and services organizations need to cost-efficiently deliver a consistently superior customer experience across their frontline service, sales, and marketing touchpoints. Approximately 1,900 corporations and government agencies worldwide depend on RightNow to achieve their strategic objectives and better meet the needs of those they serve. RightNow is headquartered in Bozeman, Montana.

For more information, please visit [www.rightnow.com](http://www.rightnow.com).

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