

世界级CRM名著，亚马逊专业类畅销榜首

客户关系管理

[美] 罗纳德·S·史威福特/著
杨东龙 / 等译 杨顺生 / 审校

加速利润和优势提升

- 获取最大利润客户；
- 永远建立客户忠诚；
- 创造客户个性化服务；
- 驱动强大市场效率；
- 预测客户行为……

有什么能比一套健全而有效的客户关系更重要的呢？客户关系中蕴藏着无穷的宝贵资源和无限商机，是公司生存和发展的生命线。本书与美国本版同期出版，作者现任NCR副总裁，他在书中所提供的精彩观点和解决方案一定会

让你茅塞顿开，让你的业务峰回路转，进而登峰造极！

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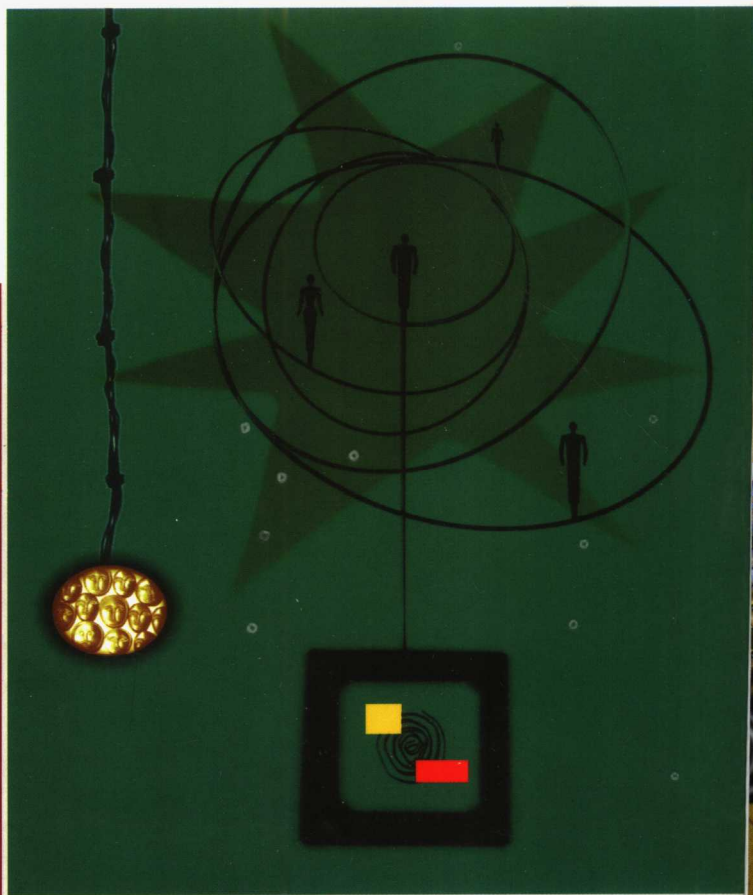
杨东龙 主编



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中西合璧的管理利器



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[美] 罗纳德·S·史威福特 / 著

杨东龙 姚成龙 黄 燕 / 等译

杨顺生 / 审校

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译 者 前 言

大约是 2000 年 11 月初,我接到 NCR(中国)有限公司杨顺生先生的电话,他告诉我有一本关于 CRM 的最新美国版图书,希望在中国出版,我当即表示完全赞同,因为我所在的宝利嘉顾问公司从 1998 年就开始关注这一领域,我们深知这一课题的重要价值,特别是它对中国企业和中国读者所能产生的深远意义。

本书作者 Ronald S. Swift 先生是该领域当之无愧的世界级专家,他的渊博知识和丰富经验使得该书的翻译工作变得较为困难,我们组织了数名译者,希望在今年 3 月前能与读者见面,但初期的译稿大多差强人意,特别是在名词术语和专业表达方面问题较多(由于 CRM 和 DW 相对很新,以及相应的语言和结构因素),这样一来,许多部分甚至不得不另起炉灶,重新翻译,而这项工作又无可推卸地落到了我的头上。我对翻译工作算是稍微有些经验,但那已是 1987 - 1989 年的事了,这些年我的英文多少有些生锈,难免有些力不从心,所以只好又夜以继日地忙乎了三个多月,总算弄成了眼下的样子,还希望不会使读者失望。

基于我多年的管理顾问经验和对 ERP 和 MRP II 之类解决方案的认识,我相信 CRM 具有极大的独特价值。40 年前,管理大师德鲁克直觉到企业的目标在于创造客户,但企业在获得、保留和建立客户关系方面一直未能有更大的突破,直到近年数据仓库、数据挖掘及关系技术等 IT 手段的出现。随着这类信息技术的发展,CRM 领域的实质性发展可谓日新月异,这对中国企业应该既是挑战,也是机会,特别是对那些试图建立世界级竞争优势的企业而言,更是具有长远的战略意义。我完全肯定 CRM 对我国的各种类型的公司将产生切实

的帮助,无论是 CRM 的技术、手段,还是 CRM 的理念和方法论,都会是如此。

我所在的宝利嘉顾问公司将长期从事 CRM 方面的研究和应用,并切切实实地为中国市场企业提供多方面的帮助,包括培训、咨询、顾问和提供完整的解决方案,我们也希望能与该领域的专家、学者和公司进行交流与合作,共同开拓 CRM 领域在中国的应用和发展。欢迎你通过我们的网站:中国思库(CKOCOO.COM)来了解相关的信息。

这本译著是集体劳动和智慧的结晶,译者除署名人士之外,还有刘蓉女士、陈杨先生和刘畅女士等,在此对他们表示感谢。应该特别感谢的是 NCR 公司的杨顺生先生,他作为本书的审校,在繁忙的工作之余,付出了极大的精力和时间,帮助修订了某些专业词汇并提出了宝贵意见。NCR 的王琳女士为翻译过程中的联系、沟通和其他事项贡献良多,在此一并致谢!

光阴似箭。当我动手翻译这本书时,我的儿子杨谨源(家里人都叫他小龙)正要出生,现在他已经快 1 岁了。小龙长得聪明灵秀,活泼壮实,十分惹人喜爱,他成了我精神上莫大的动力,足够让我战胜商旅中的任何艰难险阻。一个新的生命就是一个新的希望和新的未来。但愿这本新的译作,对中国企业和中国经理人而言,也是一个新的希望和新的未来。

尽管我们尽了最大努力,但译作中仍然难免有错漏之处,恳请读者不吝批评指正。有关讨论可直接发邮件:

crm@ckocoo.com 或 ckocoo@263.net

杨东龙

2001 年 6 月于北京大慧寺

2002 年 2 月修改

校 者 前 言

参加 2000 年 NCR 全球数据仓库用户大会的启示

2000 年 9 月底陪同上海证券交易所和中央登记结算公司的领导参加 NCR 公司在奥兰多迪士尼乐园举行的全球数据仓库用户大会,为期五天的盛会,有超过 250 场关于客户经验谈(包括上海证券交易所中央登记结算的案例)、CRM 战略和管理、电子企业、产品培训、产品技术、信息战略和管理、咨询顾问分析师预测等研讨会,这是 NCR 公司数据仓库事业部第十四次举办的年度用户大会。在开幕式当天,大会主席 Perman 先生,Applebee 国际公司首席信息执行官,宣布参加人数超过 3000 人,其中海外人数将近一半,是历年来参加人数规模最大的数据仓库用户大会。

在会场上,每一场研讨会都是座无虚席,有几场因为个人比较晚到会场,就无法进入参加研讨。面对与会人员如此积极的求知态度,内心质问是什么动力让这些来自不同地区和文化背景的用户如此用心、努力学习呢?为了解真正的理由,个人就问来自欧洲的几位用户,竟然答案相近,都是认为“他山之石,可以攻玉”,了解和学习同业如何利用数据仓库的经验,以便发展适合自己情况的数据仓库应用,他们认为采用这种模仿成功者的经验,再结合本身情况进行创新的做法,是建设成功的数据仓库最有效的方法,也是古今中外做任何事最有效的和成功的不二法门。

听到上述的真知灼见,内心一则以喜一则以忧,喜的是发现建设数据仓库成功的捷径,可以与国内用户分享;忧的是只有我听到,如何可以让国内的用户知道这个事半功倍的方法呢?内心在忧虑之

际,刚好遇见本书的作者史威福特先生,他告诉我本书的原文版第一版已经卖完,再版书即将上市,在大会上他已经签字的书有数百本,并送一本他签字的书给我。翻一翻他的书,内容正好是在介绍数据仓库和客户关系管理的案例、关键成功因素和方法的,完全可以解决我所忧心的问题。我马上告诉他,我必须在国内出版这本书,请他支持我的提议并帮我联系出版商,他欣然答应并要求我,在他下次到中国时一起发表中文版新书,我也欣然接受他的要求。

出版过程中所遭遇的挑战

首先是国内书价的确定。在与出版商经过了三个月的协商,终于达成了协议,授权中文版在国内出版。原文版价格约 40 美元,考虑国内读者在价格的接受能力和为让更多的读者可以用经济实惠的投资,学习数据仓库建设和客户关系管理的新知识,最终在宝利嘉顾问公司的支持下拟定了适合国内读者的价格。

其次是在翻译工作中所面临的挑战。由于作者的经验和知识丰富,使得本书内容牵涉到的领域比较广,包括信息技术、管理学、客户隐私法规和行业经营知识(电信、银行、零售、医疗保险、航空、旅游、制造、铁路、娱乐等);同时兼顾理论基础和实践经验的探讨;另外许多与文化相关的专用名词和语法等。上述的因素皆增加翻译工作的困难度。因为在国内具备上述领域的通才型的专家比较少;且数据仓库和客户关系管理刚起步,有太多的新名词和观念尚未标准化;因此本书中有许多名词在国内皆是首次登场,难免读者在阅读时会感觉文章有些艰涩难懂。

最后是审校者本人在学术理论、行业知识和时间上的制约。虽然本人在信息行业有十七年的工作实践经验、具备计算机专业和工商管理硕士的理论基础,但在行业知识和西方文化认知上有所不足;再加上只能使用工作之余的时间进行审校,难免考虑不够全面和仔细。

致谢

首先,感谢上海证券交易所和中央登记结算公司的领导让我陪同他们去参加2000年NCR全球数据仓库用户大会,并在会场上发表数据仓库的建制经验,说明中国在证券交易为提高监管能力使用数据仓库作为监管手段。由于参加此次的会议,让本人有机会接触作者并获得作者支持出版本书的中文版本,同时解决本人内心的忧虑,感谢上交所和中央登记结算公司的领导为我创造上述的机会。

其次是感谢宝利嘉公司杨东龙先生和相关的翻译人员,杨东龙先生组织专业的翻译队伍和亲自的大力支持,他们日以继夜、夜以继日的工作态度,使得本书中文版翻译工作可以顺利完成。由于杨东龙先生兢兢业业负责任的态度,要求质量第一时间第二,为坚持高质量的内容宁可推迟面市,本人再次感谢杨东龙先生为本书所作出的贡献。同时感谢中国经济出版社的支持,让本书如期顺利出版发行。

最后是感谢国内的读者,希望您们提供宝贵的意见,如前所述要完成本书翻译和审校工作的困难度非常高,难免书中的内容有欠周详或错漏之处,尚祈读者不吝指正,以便再版时可以更正。对书中内容或审校工作如有任何建议,请使用 simon.yang@china.ncr.com 与本人联系。本人当竭尽所能回答提问。谢谢!

杨顺生

2001年6月3日于北京

作者的中文版前言

PREFACE FOR CHINESE EDITION

As the birth of the new twenty – first century has arrived, it is essential that organizations change to carefully change to invest in their customers. Enterprises in many countries that achieve high customer retention and high customer profitability aim for:

The right product (or service), to the right customer, at the right price, at the right time, through the right channel, to satisfy the customer's need or desire.

Information Technology in the form of sophisticated databases fed by electronic commerce, point of sale devices, Automatic Teller Machines, and other customer touch points is changing the roles of marketing and managing customers. Information and knowledge bases are being leveraged to drive new profitability and manage changing relationships with customers.

The creation of knowledge bases, sometimes called data warehouses or INFO – Structures provides profitable opportunities for business managers to define and analyze their customers' behavior to develop and better manage short – and long – term relationships.

Relationship Technology will become the new norm for the use of information and customer knowledge bases to forge more meaningful relationships. This will be accomplished through advanced technology, processes centered on the customers and channels, as well as methodologies and software combined to affect the behaviors of organizations (internally) and their customers/channels (externally).

We are quickly moving from Information Technology to Rela-

relationship Technology The positive effect will be astounding and highly profitable for those that also foster CRM.

At the turn of the century, merchants and bankers knew their customers; they lived in the same neighborhoods and understood the individual shopping and banking needs of each of their customers. They practiced the purest form of Customer Relationship Management (CRM). With mass merchandising and franchising, customer relationships became distant. As the new millennium, companies are beginning to leverage IT to return to the CRM principles of the neighbor store and bank.

The customer should be the primary focus for most organizations. Yet customer information in a form suitable for marketing or management purposes either not available, or becomes available long after a market opportunity passes, therefore relationship opportunities are lost.

Understanding customers today is accomplished by maintaining and acting on historical and very detailed data, obtained from numerous computing and point - of - contact devices. The data is merged, enriched, and transformed into meaningful information in a specialized database. In a world of powerful computers, personal software applications, and easy - to - use analytical end - user software tools, managers have the power to segment and directly address marketing opportunities through well managed processes and marketing strategies.

This book is written for business executives and managers interested in gaining advantage by using advanced customer information and marketing process techniques. Managers charged with managing and enhancing relationships with their customers will find this book a profitable guide for many years. Many of today's managers are also charged with cutting the cost of sales to increase profitability.

All effective managers need to identify and focus on those customers who are the most profitable, while possibly, withdrawing from supporting customers who are unprofitable.

The goal of this book is to help you:

1. identify actions to categorize and address your customers much more

effectively through the use of information and technology.

2. define the benefits of knowing customers more intimately, and.
3. show how you can use information to increase turnover/revenues, satisfaction, and profitability.

To increase your Return on Investment (ROI), the right information and relationship technologies are critical for effective Customer Relationship Management(CRM). It is now possible to:

1. know who your customers are; and who are your best customers
2. stimulate what they buy or know what they won't buy
3. time when and how they buy
4. learn customers' preferences and make them loyal customers
5. define characteristics that make up a great/profitable customer
6. model channels are best to address a customer's needs, and
7. predict what they may or will buy in the future.
8. keep the best customer for many years

The level of detailed information that companies can build about a single customer now enables them to market through knowledge - based relationships.

By defining processes and providing activities, this book will accelerate your CRM "learning curve", and provide an effective framework that will enable your organization to tap into the best practices and experiences of CRM - driven companies (see Chapter 14).

In Chapter 6, you will have the opportunity to learn how to (in less than 100 days) start or advance, your customer database or data warehouse environment.

This book also provides a wider managerial perspective on the implications of obtaining better information about the whole business. The customer - centric knowledge - based info - structure changes the way that companies do business and it is likely to alter the structure of the organization, the way it is staffed, and, even, how its management and employees behave.

Organizational changes affect the way the marketing department works

and the way that it is perceived within the organization. Effective communications with prospects, customers, alliance partners, competitors, the media, and through individualized feedback mechanisms creates a whole new image for marketing and new opportunities for marketing successes.

Chapter 14 provides examples of companies that have transformed their marketing principles into CRM practices and are engaging more and more customers into long – term satisfaction and higher per customer profitability.

I would like to take this opportunity to thank the many talented people who have contributed to this book in the form of superlative ideas, sharing of their experiences, and their continuing encouragement. They are recognized throughout the book within the areas of their contributions, as well as in the special acknowledgment section that follows.

The following friends, mentors, and colleagues helped to make this book possible:

- Heather Anderson
- Robert Armstrong
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- Scarlett Van Der Muellen
- Eugene Verdu
- Hugh Watson
- Joseph Wenig
- Chris Yannik

In the title of this book and throughout its pages I have used the phrase "Relationship Technologies" to describe the increasingly sophisticated data warehousing and business intelligence technologies that are helping companies create lasting customer relationships, therefore improving business performance. I want to acknowledge that this phrase was created and protected by NCR Corporation and I use this trademark throughout this book with the company's permission. Special thanks and credit for developing the Relationship Technologies concept goes to Dr. Stephen Emmott of NCR's acclaimed Knowledge Lab in London.

As time marches on, there is an ever-increasing velocity with which we communicate, interact, position, and involve our selves and our customers in relationships.

This book features many companies using CRM, decision-support, marketing databases, and data-warehousing techniques to achieve a positive

ROI, using customer – centric knowledge – bases .

Success begins with understanding the scope and processes involved in true CRM and then initiating appropriate actions to create and move forward into the future. Walking the talk differentiates the perennial ongoing winners . Reinvestment in success generates growth and opportunity

Success is in our ability to learn from the past, adopt new ideas and actions in the present, and to challenges the future .

If the leaders of emerging nations , their governmental practitioners and decision – makers , and their commercial business partners were to read this book AND then practice the methods within these pages . . . their economics , trade , commerce , taxation , services , medical care , manufacturing , distribution , inventory , finance , and even their industrial growth could increase multiple fold . Therefore the author does provide a challenge to these leaders . “bring forth your learned and give them more knowledge”

There are proven examples that show the practices and data management techniques that are ascribed to in this book , also work in governments and in taxation authorities . Therefore , the challenge may be to just provide such information and knowledge to the leaders , with appropriate explanations of the benefits , and then implement the processes to achieve multiple higher objectives .

My special thanks also go to the contributions and work of Simon Yang , Lily Wang , the entire NCR China Teradata Division ’s Team in the People ’s Republic of China , and also to China Economics Publishing House for their joint efforts to publish this book in Chinese .

Hopefully , this special edition will provide increased opportunity for all of them to succeed beyond their wildest dreams for the future .

Respectfully ,

Ronald S. Swift
Port Saint Lucie , Florida
January 2001

关于本书的赞誉

作者一步一步地向读者揭示了数据仓库发展的不同阶段：从第一代的决策支持数据仓库到交叉功能动态数据仓库，并由此达到了如今市场驱动机制的高速发展阶段。

本书在帮助我们正确认识以客户为中心的时代方面具有极其重要的价值。因此，每一个企业领导人和 IT 职业经理人一旦拥有这本书，一定会一口气将它读完。

——Lon Agosta

哲学博士，Giga 信息集团高级工业分析师，
著有《数据仓库基本指南》

每当组织在运用信息技术上迷失方向或潜能不能充分发挥时，罗纳德·史威福特总能高瞻远瞩地找出解决问题的良策。在本书中，作者结合自己多年来在世界一流公司工作的经验和体会，向我们提示了作为企业经理或信息系统经理应该怎样使用信息技术去帮助自己的组织发展并增强有利润的客户关系。

——Hugh J. Wastson

《数据仓库杂志》总编辑

罗纳德·史威福特因其深刻的见解和清晰的沟通而使自己的管理顾问工作达到了极高的水平，并因此赢得了其同行的高度赞誉。在《客户关系管理》一书中，他毫不隐晦地直言相告，帮助你的公司如何将客户信息变成财富。

本书有助于你制定切实可行的整体行动计划，去赢得显著的竞争优势。

——Earl Hadden

Hadden 公司管理顾问，著有
《Hadden - kelly 数据仓库方法论》

我与罗纳德·史威福特相识多年。我惊讶于他关于客户关系管理和数据仓库的丰富知识。本书的每一页都凝聚着他的智慧结晶，而且本书的可读性很强。这是一项权威性的工作。

——Paul Gray

Claremont Graduate 大学信息
科学学院教授、创始人、信息
系统学会会员、信息系统学会通讯编辑

一旦你的客户获悉你对他们非常了解，你的生意必将获得成功。罗纳德·史威福特在书中向我们提供了为赢得客户和利润而建立的坚如磐石的客户关系管理，以及数据仓库战略所需要的工具、框架和方法。罗纳德·史威福特在这方面将继续拥有他的显著优势：渊博的学识和丰富的实践经验。

——Bill Inmon

数据仓库概念之父，并撰有 30
本关于数据仓库、决策支持
和数据库技术的著作

罗纳德·史威福特十分了解企业和政府部门在为其客户服务并加强与客户的积极关系时所面临的关键问题。他能向你提供越来越多的关于如何获得成功的深刻见解。

——Barbara Haley Wixom

Virginia 大学 McIntire 商学院助理教授
《数据仓库杂志》编辑

罗纳德在建立以客户为导向的数据仓库方面所做的十几年工作，向我们清晰地提供了这样的观点：公司必须怎样做才能在客户为中心的业务最初阶段就取得实实在在的成功。罗纳德的书将这种知识具体化，并为成功地实现它们提供了明确的指南。

——John Mckean

《信息大师——客户竞争的秘密》一书的作者

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本书介绍了参与网络经济竞争所必需具备的知识。那么如何去做呢？回答是：提供竞争利器——了解客户需要什么以及怎样更好地为他们服务。

——Gail Rigler

EDS 公司 (Plano, Texas) 全球营销副总裁

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CRM 既不是一套装置，也不是一个项目，而是一种流程。《客户关系管理》一书就向你展示了在你的公司中实施这种流程的结构。罗纳德·史威福特再一次以他的洞察力、经验和实用性建议向你展示了实施这种流程的途径。

——Claudia Imhoff

哲学博士，著有《信息工厂》，

Braun 顾问公司高级副总裁

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罗纳德·史威福特写作本书的目的是帮你与客户忠诚度之间建立牢不可破的关系。该书提供了赢得客户和利润的工具、框架和诀窍。

——Martha Rogers

哲学博士，Pepper and Rogers 集团，著有

《一对一的未来》、《一对一领域手册》、《B2B 中的一对一》等

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