



## Customer Relationships Checklist

Once you've got the basic ideas mapped out but before you go too far into planning how to build your site, use this set of questions to frame your thinking about simultaneously building your customer relationships and your business intelligence.

1. How do you gather information about your customers? Where does customer data currently reside?  
Identify the hardware, software, and data formats.
2. To improve customer service, which departments need to share customer profile data?  
Marketing? Sales? Accounting? Production? Shipping? Which departments would benefit most from aggregating customer data?
3. What do you know about your customers? Which ones generate referrals? Which other products do they already own? Which are the top volume contributors or have the greatest influence? What is your profitability by customer set?
4. What are your customers' preferred touch points? Prioritize the list. How do you know which customers have responded to which marketing promotional offers on the Web and in other media?
5. Do you know the cost of serving each customer? Order fulfillment? Customer support? Which products or services generate the greatest support needs?
6. What is the cost of acquiring each customer? How will you know which ads are most effective? How do you know which customers to target for a special promotion?
7. Can you pull together, integrate, and synthesize information from all the customer touch points?  
Do you have a process to quantify the savings from aggregating customer data? Can you measure the value in terms of improving customer loyalty?
8. Does your IT department have the time and skill sets to create a robust business intelligence machine?  
What training, integration, or other Web services do you need to consider outsourcing?
9. Is "build strong customer relationships" one of your business goals for your Web site? How will you measure success? How will you measure the value of IT investments towards this goal?
10. Do you have top management support for improving customer relationships? Who is championing this effort?