Technology in administration

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You might think "what a dry topic" but think again! The most important aspects of technology are in fact the human aspects. Let me explain.

Know your client

It is all too easy for administrators to think they are information processors instead of realising they hold a relationship with a client. How you capture that information, store it and use it intelligently will give you the advantage as an administrator. A CRM system can be very powerful but it can only do what human brains have inputted it to do.

Take an example. If you really get to know your client, you will know where they live and what language preferences they have. Then, in providing the best service to the client, you might realise that sending a letter in the postal system would not be efficient as they live in a remote area, and you would know in which language to address the client. The client experience is enhanced. Of course KYC must at all times be subject to privacy requirements.

Once you have got to know your client and programmed the CRM accordingly, the system can be used at a micro- or macro-client level. For example, at a macro-level you can use the data-base to develop entire campaigns to reach a target audience, perhaps via social media.

Try, try and try again

Once you have designed your CRM, keep re-designing it, over and over again, to eliminate all steps that require effort on the part of your client. The aim is to make things as seamless as possible on the client side. Keep interrogating your process to see if a certain step is needed – bearing in mind the risk mitigation requirements – and if it is superfluous, shortcut it. You can think of it as using the Japanese principles for lean manufacturing, working your process design for maximum efficiency.

Safety

Safety cannot be over-emphasised in an age of cyber-crime. Build a security model that simple to implement and easy to administer. And then stick to it.

Get to grips with the security of your system – both externally and internally. A frightening statistic is that 95% of all cyber-attacks actually come from within a business. So it is best to allow users only to do the work they need to do and ring-fence other parts of the system.

Devise a robust disaster recovery process, taking into account both RPO (recovery point objective) and RTO (recovery time objective). In practice this could mean, for example, that every two hours you conduct a back-up (RPO) and that the back-up takes two hours to process (RTO).

In conclusion, the above three elements, all driven by human input, should help guide you into making your CRM powerful and competitive.

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