DEVELOPMENT OF KEY COMPETENCES
IN CRM FIELD AND E-LEARNING

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Abstract: *This paper is focused on support for optimal key competences in the CRM (Customer Relation Management) field. In order to carry out complex work with these applications, IT (Information Technology) users need optimal key competences. Default CRM course is limited, however, by the time and scope of the selected topics. The presented solution for this reality is based on the monitoring of frequently required competences and searching out optimal CRM applications to adopt the needed skills in education. For a comparison, NetSuite CRM, Salesbox CRM, Salesforce CRM are selected. Salesforce CRM provides the most integrated activities. Unfortunately, there is not a CRM application offering all the specified activities and teachers have to select other CRM applications for students to understand the CRM field better.*

Keywords: CRM, E-learning, information technology, key competences.

INTRODUCTION

Caring for customers is one the most important tasks for companies and organizations. The market is overloaded in Europe and a wide range of goods and services are available. Customers select goods based on interest, quality, availability or price. Their interest is also focused on blogs and discussion on the Internet. The reason is to share experience with using certain goods or services. Customer relation management (CRM) plays an important role in sales within this situation. (Chen & Popovich, 2003)

Customer relation management is based on processes which are focused on creating positive relationships with customers (clients). The key is to know about the preferences of customers and offer optimal goods and services at the right place, time and quality. These processes are often linked to marketing and are concerned about customers in various situations. (Kumar & Reinartz, 2012) Unfortunately, not all negotiations come to an end with a final order of payment. Sellers often have to take long preparatory actions before the deal can be closed.

Information technology provides support in this area as well. There are many applications and information systems available which are focused on customer relation management. Their control is intuitive, via a menu but responsible activation needs optimal key competences. (Helgeson, 2017) There is a place for education and cooperation between schools, universities and the private sector.

1. CRM PRODUCTS

All CRM applications argue that they are user-friendly. This is natural because design application is important for intuitive navigation in this application. IT (Information Technology) users require an instant solution with good navigation, automation of frequent tasks and accessibility to the best examples from practice, which are verified in the given environment of the company and organization. The selection of the CRM application (CRM Software Selection Quick Start Guide, 2015) is simple because there is a large volume of available applications, information systems or easy tools that the IT user may use immediately, without difficult implementation and education.

There are analyses, surveys and top product ladders on the Internet which help in navigation between the available applications. Criteria are different for sorting such as:

- CRM with the Best ROI.

- CRM with the Smoothest Implementation.

- The Most Usable CRM.

- Top CRM for Small Businesses.

- Top CRM for Midsize Businesses.

- Top CRM for Company Businesses. (Compare CRM Software, 2017)

A selection of the CRM application by the position on the market and user satisfaction also brings solid results. (Gartner Inc., 2014) By such an evaluation, there are applications on position leaders, high performers, contenders, and niche:

- Leaders have a very good position on the market and are also evaluated highly by their users.

- Contenders have a good position on the market, but their users speak of lower level satisfaction with such a product.

- High performers do not have a position on the market as leaders, but are highly evaluated by their users.

- Finally, niche solutions do not as yet have an optimal position on the market and they do not have enough users to evaluate these applications.

Out of the large numbers of CRM applications, mention is only made of a fragment: Salesforce CRM, SugarCRM, Zoho CRM, Pipedrive, and HubSpot CRM (as leaders), Base CRM, Maximizer CRM, Nimble, Vtiger CRM, Nutshell, Workbooks.com, PipelineDeals, Salesnet, Insightly, bpm'online, Membrain, OnePageCRM, Pipeliner CRM, Really Simple Systems, Prophet CRM, Less Annoying CRM, amoCRM, InfoFlo Software, Close.io, Cosential, Contactually, iSEEit, Relenta CRM, ProsperWorks CRM, Bullhorn CRM, Salesbox, Freshsales, Redtail CRM, and Salesflare (as high performers), Microsoft Dynamics 365 for Sales (formerly Dynamics CRM), NetSuite CRM, Oracle CRM On Demand, Oracle Sales Cloud, Oracle Siebel, Sage CRM, Infor CRM, and SAP CRM (as contenders), and Highrise, Act!, GoldMine, ConnectWise Manage, Apptivo Project Management, Capsule, Commence CRM, Odoo CRM, and SalesforceIQ CRM (as niche solutions).

Without regard to the adopted solution, IT users must have a good orientation on the public level in the available CRM applications. Key competences have a key role and IT user have to have it. Default knowledge is based on everyday work with customers, with the given application and education with good examples from practice.

2. KEY COMPETENCES

It is simple to say that IT users must have key competences from CRM. Key competences have their own development based on changes in preferences of costumers, availability of information technology and also changes in society. Great press is created by competition. Everyone looks at other applications, available support of CRM processes and the experiences of other customers. IT users highly evaluate competences which focused on:

- Account Management.

- Contact Management.

- Dashboards.

- Data Import and Export.

- Forecasting.

- Integration with other software.

- Lead Management.

- Opportunity Management.

- Pipeline Management.

- Social Network Integration. (MacLeod, 2017)

Management of contacts and accounts is a natural request based on traditional records of information about customers. Dashboards affect the speed of understanding the information presented. IT users see the current trends of monitored value to adopt the needed decision. Data is stored in many databases and other sources. This reality needs very good tools for import and export data in order to realize work in implemented applications. Forecasting has close links to key performance indicators and business intelligence. The reason for this is to search for an available gap on the market and business opportunities. Integration with other software helps with communication between various applications and information systems in companies and organizations. Lead management is focused on processes for leads. These processes are useful for generation, inquiry, filter, grade, distribution and qualification. A request for opportunity management has its source in reality and the way to order is complicated, with monitoring being very important. Pipeline management has links to the need to set various prices by destination, volume of orders, or other individual conditions for very important customers. Finally, social network integration works with questions, answers and other customer requests on social networks such as Twitter, Facebook, LinkedIn, or Pinterest.

From this point of view, education must demonstrate how to work with many CRM applications in different ways. The default CRM course only has default for 13 weeks to explain the given topic. This kind of course is divided into lectures and seminars with a range of 1-2 education hours per week. In this situation, it is impossible to work with all CRM applications and teach about the differences between them. The solution is to select 1-3 CRM applications as representatives with variability. This learning is focus on needed (selected) key competences, based on verified examples of good practice.

3. VARIABILITY OF EDUCATION TO SUPPORT KEY COMPETENCES

For positive acceptance of teaching by students, a high level of variability is needed and a number of examples from practice. Students understand the explained topic better based on visual support and practice examples. No one wants to read books or PDF files, although these learning sources are available in learning as well. Video and simulation, which show how to work with a CRM application, have a better influence. As concerns learning, there is not enough space to show all CRM applications, and the teacher has to select the optimal applications. This work is divided into three steps.

The first step is focused on selection of needed key competences which IT users often need for active work with CRM applications. Realized analyses and surveys that evaluate available CRM applications are recommended. For purpose learning in a CRM course, the key competences that allow for good orientation in activities

focused on contact management, dashboards, forecasting, lead management, opportunity management and social network integration are important.

The second step is focused on selection of tested applications. One may think that the selection of the CRM application is unimportant and that the teacher may select the application by preferences, or there is the idea that the best way is to select the top CRM application. As concerns testing, three applications were selected: NetSuite CRM (application I.), Salesbox (application II.) and Salesforce CRM (the top CRM application). See Table 1.

In this table, specified activities of CRM were tested in selected applications. If the CRM application allows this activity, there is the symbol "X". In other cases, there is the symbol "-". Finally, the third step is focused on a comparison of the detected options of selected applications with a recommendation for learning, which actively reflects the actual demand of IT users and provides an easier way to adopt new skills for a student.

Table 1.

Evaluation of selected CRM applications and top CRM application for learning needed key competences by selected activities

Selected activities for active work with CRM	Application I. NetSuite CRM	Application II. Salesbox CRM	Top CRM application Salesforce CRM
Contact management	-	X	X
Dashboards	X	-	X
Forecasting	X	-	-
Lead management	X	-	X
Opportunity management	X	X	X
Social network integration	-	X	X
Total number of activities	4	3	5

Source: Own work

It is apparent that Salesbox CRM provides the smallest number of monitored activities. These three activities are contact management, opportunity management and items for social network integration. On a public level, this application displays the main menu for work with tasks, delegations, opportunities, accounts, contacts, appointments, call lists, campaigns and insights. In the middle, NetSuite CRM provides four activities such as dashboards, forecasting, lead management and opportunity management. On the public level, this application displays the main menu for work with activities, leads, opportunities, customers, forecast, reports, documents, setup and support. Most of the activities are integrated into Salesforce CRM. This application provides five activities for contact management, dashboards, lead and opportunity management, and items for social network

integration. On the public level, this application displays a menu for work with contacts, accounts, leads, opportunities, reports and dashboards.

For an objective description of the selected CRM application, one must mentioned that all the applications provide a particular support for all the monitored activities, but not in an optimal implementation. Orientation has to be more user-friendly in dashboards, forecasting the need for more links on business intelligence which may make use of the potential of the stored data. For contact and leads management, CRM applications also use lists of accounts, customers, or another setup is needed. Social network integration is not ideal in all tested CRM applications, but there are inspiring chatters, links on Google Search and Google maps (Salesforce CRM), or Facebook and LinkedIn for contacts (leads), MailChimps emails (Salesbox CRM). In these cases, there are barriers in easy use CRM applications. This reality is therefore evaluated by the symbol "-" in the above-mentioned table.

From the perspective of the teacher, a good solution is to select at least two CRM applications. The reason is to demonstrate a benefits and advantages in the CRM field. For easy enter into topic, it is better to start with more user-friendly and simply CRM application. Second CRM application has to be more complex to show other options in detail via available settings and templates. The list of available CRM applications is large and an optimal interest is provided if students select a CRM application for study purposes through their own preferences as well (for example, for the preparation of a school paper).

CONCLUSION

Key competences are also of interest for customer relationship management (CRM). CRM holds an important place in many companies and organizations. Information technology support is needed in a dynamic and global society. Without regard to the adopted solution, IT users have to have a solid orientation on the public level in the available CRM applications and a relevant education is needed. From the view of students, learning has better value when they may select by their own preferences and skills. From the perspective of teachers and IT users in companies, there is a need to show the main activities in the CRM field such as contact management, dashboards, forecasting, lead management, opportunity management and social network integration.

The selection of the needed CRM application is important for learning as not all activities are offered (or easily implemented) in all CRM applications. Three applications were tested for this purpose, such as NetSuite CRM, Salesbox CRM and Salesforce CRM in the specified (main) activities. Unfortunately, there is not a CRM application that offers all the specified activities. To provide an optimal overview about the CRM field with benefits and advantages, teachers have to select at least two applications. Good advice is to select one more user-friendly application that students understand easier and other CRM application that is more

complex to show adopted solution in detail. Additional CRM application is selected by students for the preparation of school papers. This way provides variability in education and an explanation of the key competences in the CRM field.

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