

CRM Forum Resources

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Critical Steps to Successful Customer Relationship Management

Staffware eCRM, Inc.
Developers of MarketForce

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Critical Steps to Successful Customer Relationship Management

Customer Relationship Management is...?

The most successful companies today consistently demonstrate the ability to identify, understand and cater to the needs and demands of quality customers. Top executives see forging long-term relationships with premium customers as the key to stability in an increasingly dynamic market and are driving their organizations to become customer centric. This customer centric approach to identifying premium customers, understanding their complex needs and aligning your organizations capabilities to meet those needs is a fundamental concept of Customer Relationship Management. **Gartner Group** defines CRM as:

“...an enterprisewide business strategy designed to optimize profitability, revenue and customer satisfaction by organizing the enterprise around customer segments, fostering customer-satisfying behaviors and linking processes from customers through suppliers.” – **Gartner Group**

CRM: What Does It Mean To YOU?

As you begin the daunting task of developing a CRM strategy for your company, realize that the dynamics of CRM leave little opportunity for pinpointing an exact definition of Customer Relationship Management.

“Customer Relationship Management (CRM) currently means different things to different people. I’m convinced that there is no one correct definition of CRM. Moreover, the definition of CRM will evolve and change over time.”- **Barton Goldenberg, president of ISM Inc.**

While industry experts, software developers and business consultants may each present a slightly different vision of the ultimate CRM system, it is important to recognize that there is no one CRM system or strategy that provides the perfect solution for all companies. Just as each of your customers is different, your company presents unique issues that need to be addressed and incorporated into your CRM strategy. The only absolute in any CRM definition or strategy is simple: focus on the customer.

CRM: Beyond the Concept

Focusing on the customer includes having the ability to manage all interaction channels through which customers contact your company. Technology is the catalyst that enables individuals throughout your company to be more efficient

and effective in their interactions with customers. CRM software provides the tools necessary to automate, manage and integrate your sales, marketing and customer service operations. Comprehensive systems will also include reporting, web capabilities, product configuration engines and full integration with back-end systems. However, it is critical to remember that CRM is not simply a software tool or technology. Even the most sophisticated CRM system is only an element in the complex process of gaining and retaining customers.

“CRM is the standard for competitive survival. If you do not put the right tools and the right information in the hands of your people, they will not be able to perform as effectively as their CRM empowered counterparts.”

– **Jim Dickie, Managing Partner, Insight Technology Group.**

The Benefits Are Clear

Companies have found that by implementing an effective Customer Relationship Management (CRM) program, they can expect to increase sales and customer loyalty. That kind of improvement translates directly into lower costs, more revenue, and higher profits.

“Companies that successfully implemented CRM programs reported sales increases of 51 percent per rep, customer satisfaction rating improvements of 20 percent, cost of sales and service decreases of 21 percent, reductions in the length of the sell cycle of as much as one-third, margin improvements of more than 2 percent and more.” - **Jim Dickie, Managing Partner, Insight Technology Group.**

CRM-a strategic and holistic approach to grow enduring relationships with profitable customers, in order to:

- ☐ Increase the number of customers
- ☐ Achieve high retention rates
- ☐ Retain the most profitable customers
- ☐ Achieve a greater share of customers' spend
- ☐ Take a pro-active “customer view” rather than a “product view”
- ☐ Build customer by loyalty through intimate relationships
- ☐ Establish lifetime relationships with customers

-Cap Gemini

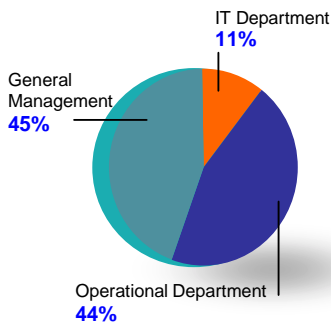
Specifically, a well-executed CRM automation program can:

- Consolidate critical information about each customer
- Target your most profitable customers and develop programs to increase their loyalty to your company.
- Personalize your service and product offerings to each customer.
- Boost your revenue-per-salesperson and territory performance, while reducing both cost-per-lead and cost-of-closed-business expenses.
- Yield faster and more accurate follow-up on sales leads, referrals and customer inquiries.
- Virtually eliminate the possibility of prospects or customers “falling through the cracks” of an obsolete or overloaded system.

- Give top managers a detailed and accurate picture of all sales and marketing activities.
- Instantly react to changing market conditions

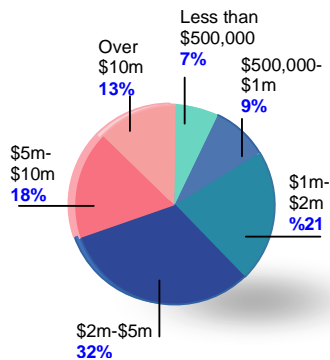
CRM – A top Management issue

Initiators of CRM Projects within US and European enterprises.



Source: IDC and CAP Gemini, 1999

Total budget allocated to the CRM project by US and European enterprises



One-third of the companies (31%) intend to spend in Excess of \$5 million on a CRM project.

Source: IDC and CAP Gemini, 1999

The CRM Strategy-Plan for Success Step-by-Step

Developing a Customer Relationship Management strategy is critical to ensuring that your CRM system is truly the CRM solution that you had envisioned. In literally thousands of successful CRM Projects, several key steps have been identified as critical success factors that are essential to the success of your customer driven solution. While some of these steps may seem obvious, given the complexity of even the smallest CRM project, managers are well advised to review the following steps at each phase of the CRM initiative.

Step One: Gain Enterprise-wide Commitment

Like any large and complex undertaking, implementing a CRM system requires the talents and energies of a broad spectrum of experts. Because CRM involves multiple areas within a company, it is important to get support from all departments: sales, marketing, support, finance, manufacturing, distribution, etc. By involving selected department members, you gain valuable input before a system is selected and installed...a step which promotes both cooperation and the vital acceptance of the new system by all segments of your company.

Getting enterprise-wide commitment involves:

- Top-down management commitment
- Bottom-up buy-in from system users
- Dedicated full-time Project Team
- Budget allocation for the total solution

Convincing every affected group within your company of the need for Customer Relationship Management is a key step to successfully implementing your CRM system. By informing all affected groups at every stage, and emphasizing the positive end results of the automation process, you can minimize resistance and increase your odds for success.

Step Two: Create a CRM Project Team

Once commitment has been secured from all departments involved in the CRM Project, the CRM Project Team must be selected. Selection of the Project Team is critical. This team will form the nucleus of the CRM effort, make key decisions and recommendations, and help communicate the details and benefits of the CRM program to the entire company. The most effective Project Teams include active representatives from top management, sales and marketing, IS/technical departments, finance and members of all ultimate user groups. Team members from each work group will represent specific desired outcome requirements from the CRM system chosen.

Management - Management must provide leadership, motivation and oversight at every phase of CRM development. Managers typically evaluate a proposed CRM solution based on basic criteria:

- Will the system provide information required to make key decisions?
- Will the system significantly impact and improve existing processes?
- Will it significantly reduce costs?
- Is it currently successful in similar installations?
- ROI?

Information Services/Technical – Information Services will by definition be most closely involved in the detailed work of specifying, selecting and customizing the actual CRM system. The technical group **MUST** be actively involved in every phase of the CRM development and must gain a high level of confidence in the specific system eventually selected and installed.

Sales and Marketing Users – Experience proves that when users are satisfied and comfortable with the final CRM system, the prospect for long-term CRM success is greatly enhanced. Users must evaluate any potential CRM system based on certain criteria:

- Is it easy to learn?
- Is it easy to use?
- Will it save time and reduce overhead?
- Will it simplify customer/prospect contact and fulfillment?
- Will it enhance communication with company and customers?
- Can it increase sales productivity?

Financial – Finance team members must provide critical analysis of any proposed CRM technology including: assessment of increased sales productivity, evaluation of lower operating costs, estimated cost of system expansion and ROI projections.

It is at this point of your CRM Project that you need to consider one more very important Project Team member—an outside CRM expert. Selection of this outside expert (a business consultant or CRM system vendor) and the decision as to when and how to integrate this source with your internal Project Team may be a critical element to the success or failure of your CRM project. A consultant's experience can provide a valuable source of objective information and feedback. A “good” CRM expert can provide consulting prior to and during your CRM implementation. They can analyze your real business needs, assist with the formation of your Project Team and work with the team to review, amend and approve the functional specifications.

Step Three: Business Needs Analysis

The business needs analysis is an absolutely critical factor in the success of your CRM project. Too often, Project Teams jump directly into the technology of the CRM initiative without first assessing their current processes and determining what exactly needs automating.

“Without identifying and fixing process holes first, you will only end up doing inefficient and ineffective things faster than you have done them before.” – **Jim Dickie, managing partner, Insight Technology Group**

In this analysis phase, a series of sessions should be held to canvass top sales, marketing and customer service managers, regarding the need and strategy for a CRM system. Form a consensus as to their vision of the ideal Customer Relationship Management system. Identify essential goals for CRM within each department and then collectively define objectives for how CRM should impact each work group and the company as a whole. The idea of these sessions is to conceptualize the ideal CRM solution for your company. Those items that seem unnecessary or unrealistic may be eliminated later on in the specification stage of the CRM project. Take special care to acknowledge and evaluate all ideas, so that all participants feel they are a part of this important process. Results of these meetings will help formulate the basic game plan for the CRM project.

In formulating your CRM game plan, the gathering of information on specific problem areas, identifying particular goals and defining objectives must be done uniformly throughout the company. The following CRM Survey is designed to gather crucial information needed in developing a comprehensive CRM system specifically for your company.

CRM Survey

- ☐ What functions do you perform?
- ☐ What types of data do you use?
- ☐ How do you interact with customers?
- ☐ What data can be made available to you to help you better understand customers?
- ☐ How can we improve our communication with customers and management?
- ☐ How can we reduce administrative and scheduling requirements that detract from our time building relationships?
- ☐ How are you involved in outreach activities such as telemarketing and direct mail?
- ☐ What are your reporting needs and requirements?
- ☐ How are you involved in lead tracking, lead follow-up, data transfer and other daily details and how may they be improved?

When performing this survey, be sure to seek input from end-users, the salespeople, customer service, marketing personnel, order fulfillment and account management personnel who actually deal with customers on a day to day basis. Determine the tools they need for success in developing meaningful relationships with customers. Those that perform these jobs on a daily basis are valuable. They will know what changes are needed to improve relationships with your customers.

The survey identifies business functions that need to be automated and provides the base for determining what technological features are required in obtaining your optimal CRM solution. Your business analysis and CRM Survey results will essentially serve as a blue print for you entire automation project.

Step Four: The CRM Plan of Action

Now that you have developed a “blue print” of your company’s ideal Customer Relationship Management System, you must develop a “Plan of Action” that details the process needed to turn your CRM vision into reality. In this Plan of Action phase, many determining factors must be considered which extend well beyond the CRM system specifications that you have identified up to this point.

This plan will answer the following questions essential to the success of your CRM Project:

Where do I start my search for a CRM solution?

The best place to begin your search for CRM solutions is the industry experts. The CRM industry has many consultants and analysts whose sole responsibility is CRM research and reviews. These consultants can provide detailed reviews of any reputable CRM solution on the market. Suggested CRM experts:

- **ISM-Information Systems Management, Inc.**-Awards the Top 15 CRM Solutions Annually -This award is considered the “Oscar Awards” of the CRM industry.
- **MetaGroup** - META Group helps companies make technology (IT) decisions by providing research and analyst consultation relevant to their specific business needs. META Group Offers advisory services, consulting/benchmarking, and access to various IT publications. META Group addresses the latest technologies, industry trends, and business challenges
- **OVUM** - Ovum is an independent research and consulting company, offering expert advice on IT, Telecommunications and E-commerce.
- **GiGa Information Group** - Giga Information Group provides research, advice and coaching on technology for e-business. Giga helps clients make strategic decisions about the technologies, people and processes needed to excel in the new digital economy.

How do I decide which CRM solutions would be a viable option for my specifications?

The evaluation process is the key to creating your long list of possible CRM solutions. Again, you'll need input from all user groups to develop and prioritize your CRM solution requirements for evaluation. In this process, it is necessary to identify the essential elements that make up a comprehensive CRM Solution. When considering a CRM solution, you are ultimately looking at three elements – software, technology and vendor. It is very important to realize that these three elements are not independent. Ensuring CRM Success means that these three elements work as a cohesive unit and compliment each other. Strength in one element cannot overcome weakness in another.

I have identified several CRM Solutions that might work for my company. How can I go about narrowing my choice?

The process of turning your long list into your short list is simply research, research, research. Contact the vendor and ask questions. Send "Request For Proposals" to those vendors in contention. Review vendor web sites. Are the vendors utilizing the technology that they are promising you? Ask the vendor for references. Finally and most importantly, ask for vendor demonstrations as you investigate the capabilities of each potential vendor and its products or services. Many vendors try to sell the "concept" of their product's capabilities solely through product presentations. Be wary of vendors that balk at live product demonstration requests, they may be promising functionality that is expensive, difficult or impossible to produce. Live product demonstrations allow you to experience first-hand the CRM functionality available from the vendor.

Furthermore, consider your interactions with the company. Did they seem confident and knowledgeable? Did they answer your questions effectively? Were key people easy to reach? Are you completely satisfied with how you have been treated up to this point? This discussion and research stage should be when the vendor is putting their best foot forward. Any problems experienced during this time may be an indication of things to come. Make sure your Project Team and especially your IT team members have confidence in the vendor chosen.

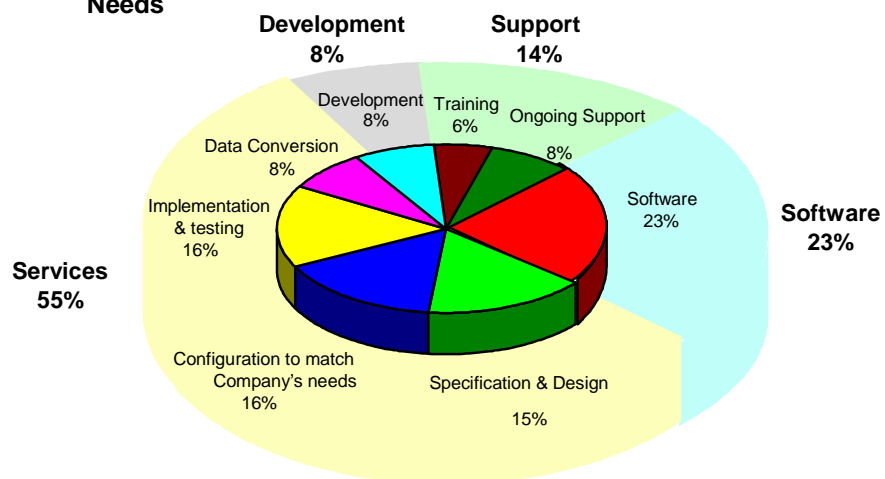
What else should be considered before making my final CRM solution selection?

After you have found the CRM solutions with the software, vendor and technology capabilities that fit your companies needs, a few considerations still exist that will help you make your final decision. A primary consideration for most is the cost. A standard industry base for estimating the cost of your CRM project is 1/3 cost for software and 2/3 cost for consulting, implementation and training, as represented below.



A more comprehensive breakdown of average base costs for a CRM project is demonstrated below:

Estimated Average Base Cost: Based on Typical CRM Project Needs



Also, beware of CRM systems that require a full team of vendor technicians or consultants to make changes. If consulting, implementation and training are done properly with a quality CRM system, system changes should be made easily without the continuous extra expense of required "consultants".

As demonstrated, there are many determining factors in the cost of a comprehensive CRM solution which are not represented by the list price. When determining the cost of a CRM project, you may want to begin with at least the following questions:

- Will the system need to be customized or will it work “out of the box”?
- How much customization is required and at what cost?
- How much will consulting for the project cost?
- Can the system be easily configured and maintained by your company's IT staff or is continuous outside assistance required?
- What is the cost of training your staff to use the CRM system?
- How much maintenance does the system require and do you have the internal personnel to handle it?
- What new software and hardware must be purchased to accommodate the new system?
- What is the timeframe for implementation and what will become of current system processes during that time?

While not comprehensive of all cost determining factors, these questions can represent major costs to any CRM system implementation and maintenance processes and should be evaluated when considering a CRM solution for your company. Further considerations involve identifying the right combination of software, technology and vendor. Because each of these elements is critical to the success of your CRM project, we discuss them in greater detail below.

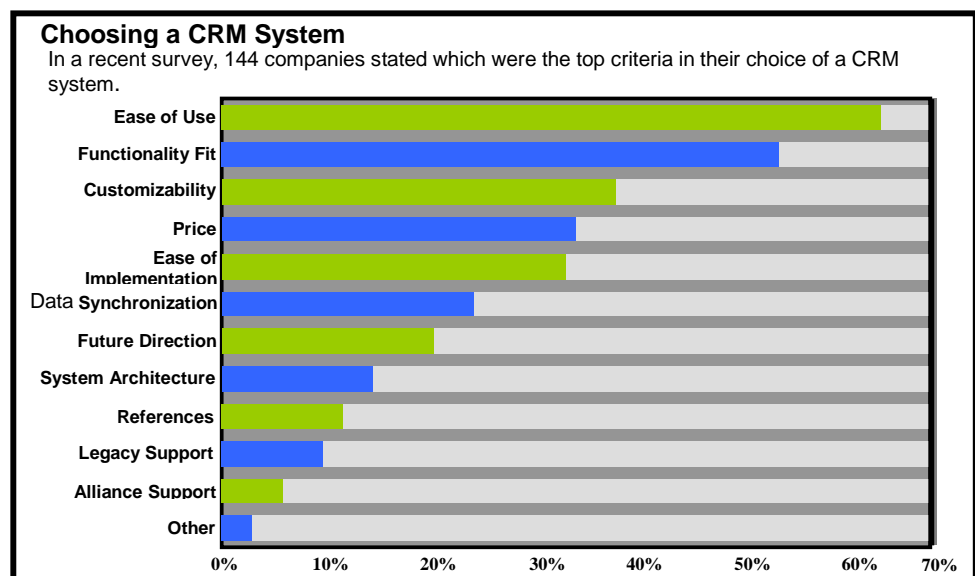
Step Five: CRM Software Selection

When choosing your CRM software, the goal is to support and promote an optimized sales, marketing and customer service process, which means your software choice should be based on knowledge of your firm's current technology infrastructure and a comprehensive set of your functional requirements. Comprehensive CRM software is comprised of several dynamic segments which provide the tools necessary to manage all interaction channels through which customers contact your company. True CRM software will provide at least the following functionality:

- Contact & Account Management
- Sales Management
- Telemarketing/Telesales
- Customer Service
- Marketing
- Business Intelligence
- Lead Management
- E-commerce

Of course, this functionality listing is by no means comprehensive of what CRM software can do for your company. We have included a detailed [CRM Software Selection Checklist](#) at the end of this document to aid in your selection. The elements listed in the checklist are representative of the specifications required by ISM for consideration of their Top 15 CRM Solutions award. Certainly, all of your CRM software possibilities need not meet each of the outlined criteria in the checklist. Focus first on meeting those specifications identified by your CRM survey and CRM Project Team, then explore other elements that may benefit your company now or in the future. Finally, make sure you ask for vendor demonstrations as you investigate the capabilities of each potential vendor and its products or services.

In a recent survey conducted by Jim Dickie, Managing Partner of Insight Technology Group, 144 companies identified their top criteria in their choice of a CRM system:



Source: Jim Dickie, Managing Partner, Insight Technology Group-Customer Relationship Management Magazine- April 2000

Step Six: Technology

Technology must be employed smartly to ensure success of your CRM project. Because no two companies are alike, there is no such thing as “one size fits all” CRM solutions. The differences inherent to each company must be reflected in the enabling technology. Therefore, it is critical that any technology selected be customizable, open and capable of integration with the organization's existing computing infrastructure. Further technological considerations for choosing your CRM system are identified below. These features are also included in the *CRM Software Selection Checklist* included at the end of this document.

- **Rapid Application Development Toolset** – Allows users to easily make changes to screen data flows and other configurations. Each application can match the user's specific workflow, greatly reducing the number of keystrokes and cursor movements needed to accomplish their particular job. This feature opens the possibility for you to completely redesign and dramatically improve the way your company handles your sales processes
- **Multi-platform SQL Database Support** - Multiple database platforms are supported and should range from field sales portables to enterprise servers scaled for running corporate databases.
- **Cross Platform Data Synchronization** - Supports simultaneous data synchronization across multiple database platforms, even on the same Local or Wide Area Network, or combination of LAN and remote laptop users. This ability gives you total flexibility to design your entire system using the database platform that fits your support capabilities, technical and data requirements.
- **Multi-level Security for Users and Data**
- **Scalable, Best Fit Database Platform for the Job**
- **Real-time Integration with Other Applications**

- **Web Technology** – Web capabilities empower customers, partners and prospects for self-service and interactions with the enterprise via the Web. Web technology is vital to CRM success and the success of your business from this point on.

Step Seven: Considering a Vendor

Selecting a CRM software vendor is as critical as selecting the CRM software. When choosing a vendor, CRM experience is a crucial element. With the recent explosion of Customer Relationship Management, everyone that automates anything is jumping on the CRM bandwagon with their “hot off the presses” CRM solution. Trust your complex CRM initiative to a vendor that has years of experience, a proven track record, and will still be in business to offer long term support. Choosing an experienced vendor that you have strong confidence in, can communicate easily with and is responsive to your needs and requests is essential—they will be with you for the life of your CRM system. An experienced vendor will:

- Identify specific business automation requirements.
- Train Project Teams.
- Design, document, and configure the system.
- Provide implementation and technical support.
- Train users, managers, and support staff.
- Roll-out the CRM system to user workgroups.
- Provide ongoing support services.

The effectiveness of the consulting, implementation, installation and training phases of your CRM project are dependent upon the chosen vendor. The best software coupled with the latest technology will only be wasted money if the vendor is incapable of providing a solid foundation and reliable support for your continued CRM success.

Step Eight: Implementation & Installation of CRM System

CRM success depends on your commitment to a strategic implementation. We have identified seven strategic phases of a successful CRM implementation. This strategic approach has been utilized successfully for years and is critical to a successful project:

Phase 1: Analysis and Specifications

This phase of the implementation process involves developing a comprehensive Needs Analysis, defining the Scope of the Project and identifying System Specifications.

Phase 2: Project Planning and Administration

This phase is where the Project Implementation Plan is developed. A vendor Project Administrator should be identified as the communication point between the vendor and your company. In addition, a System Administrator from your company will need to be appointed as the in-house system expert. Your Project Team and the training of that Project Team will also happen in this stage. Finally, you will need to Quantify Your ROI so that you can effectively measure any return on investment realized from your new system.

Phase 3: System Configuration and Tailoring

At this stage, your CRM system will be configured and customized to accommodate the vast majority and diverse nature of your business needs. Technical training should accompany your specially tailored system and allow your staff as much technical self-sufficiency as desired. Also, any new hardware and software required should be installed at this stage.

Phase 4: Prototype, Compliance Testing and System Re-work

A system prototype is developed and tested at this stage. Your staff will be able to get familiar with the installation process and the various aspects of the systems installed. Any needed changes to the system will be made at this time.

The critical task of Data Conversion also occurs at this stage. Intense communication is required between the vendor's Implementation Specialists and your MIS personnel. Because of the substantial efforts involved in the data conversion process, it is nearly impossible to accurately predict a time frame for the process.

Phase 5: Pilot System and Quality Assurance Testing

This is where the bulk of training occurs. It is suggested that a “Train the Trainers” session happens at this juncture. Acceptance of a new system, new procedures and new policies is far greater when delivered by one of your own staff than by an outside vendor. This “Trainer” will be responsible for training all end users and management on the new system. However, for this method to be effective, the “Trainer” must become an expert on the new system through training sessions offered by the software vendor.

The Pilot System should be a re-worked and a perfected prototype system introduced at this point. A small user group should begin working with and testing the new system. These quality assurance tests should be documented and provided to your Project Team Manager.

Phase 6: Final Implementation and Roll-Out

This is the action stage and the final implementation stage of your new system. These final steps will require a significant time commitment on the part of your technical staff. An implementation guide should be made available to you outlining each task that must be completed prior to and as part of your implementation.

Formal training of all users also happens at this stage. A proper setting of expectations is required and is usually achieved through a formal training session. Users must realize an immediate and tangible benefit to using the new system or you could face resistance. Training will be based on needs defined in the planning phase. A well-executed training plan can mean the difference between success and failure.

Phase 7: Ongoing Support

Ongoing support of your system will require one full-time in-house System Administrator in your company. This will allow you the flexibility of technical self-sufficiency. To build your in-house expertise, exposure to your CRM system should begin during the planning stage. Because Technical Support of a CRM system is a big job, be sure that your vendor offers comprehensive support plans to supplement the support of your in-house team.

Step Nine: Ongoing Management of the CRM System

It is essential that your CRM system infrastructure provide for performance measurement. It will need to efficiently capture appropriate data and allow access to appropriate individuals. To ensure the system generates the desired benefits, test it before you roll it out to the entire user community. If it does not perform to your satisfaction, take the time to modify your tool set until it does. At the user level, you'll need feedback mechanisms for coaching by managers and self-management.

Finally, your system should also provide feedback to the oversight steering committee and Project Team. This intelligence can provide invaluable insights into what's working, what isn't and what opportunities exist to better leverage your investment in technology.

CRM: Invest Time and Resources for CRM Success

Customer Relationship Management is a complex undertaking that is critical to the success of businesses today. Planning for a successful CRM initiative involves placing extreme importance on each phase of the planning, implementation and management stages of the entire CRM project. Invest the time and resources required at each stage of your CRM project and your company will soon realize the benefits of CRM success.

CRM Software Selection Checklist

Contact & Account Management <input type="checkbox"/> Contact Profile <input type="checkbox"/> Activity History <input type="checkbox"/> Organization Chart <input type="checkbox"/> Business Relationships <input type="checkbox"/> Order Entry, History & Tracking <input type="checkbox"/> Proposal & Sales Contract Generation <input type="checkbox"/> Internet Account Management <input type="checkbox"/> MS-Outlook Integration <input type="checkbox"/> Native Calendar <input type="checkbox"/> Multi Platform Data Synchronization	Customer Service <input type="checkbox"/> Incident Analysis <input type="checkbox"/> Incident Assignment & Escalation <input type="checkbox"/> Incident Tracking <input type="checkbox"/> Multiple Issues per Incident <input type="checkbox"/> Order Tracking <input type="checkbox"/> Self Service Marketing <input type="checkbox"/> Campaign Planning and Budgeting <input type="checkbox"/> Marketing Event Management <input type="checkbox"/> Marketing Encyclopedia <input type="checkbox"/> Literature Fulfillment <input type="checkbox"/> Database Marketing <input type="checkbox"/> Campaign ROI Analysis <input type="checkbox"/> Customer Retention <input type="checkbox"/> MS-Word Integration	E-Commerce <input type="checkbox"/> Shopping Cart <input type="checkbox"/> Place Orders Online <input type="checkbox"/> Email Order Confirmation Lead Management <input type="checkbox"/> Internet Lead Generation <input type="checkbox"/> Lead Enhancement <input type="checkbox"/> Routing to Partners Business Intelligence <input type="checkbox"/> Reporting-Predefined & Ad Hoc <input type="checkbox"/> List Management <input type="checkbox"/> Dashboard <input type="checkbox"/> Alerts & Alarms Scheduling <input type="checkbox"/> Real-time Productivity Monitoring
Sales Management <input type="checkbox"/> Opportunity Management <input type="checkbox"/> Forecasting <input type="checkbox"/> Sales Cycle Analysis <input type="checkbox"/> Sales Metrics <input type="checkbox"/> Activity Reporting <input type="checkbox"/> Mapping Tools & Territory Alignment <input type="checkbox"/> Expense Reporting	System Tools & Technology <input type="checkbox"/> Rapid Application Development Toolkit <input type="checkbox"/> Multi-Platform SQL Database Support <input type="checkbox"/> Cross platform Data Synchronization <input type="checkbox"/> Multi-level Security for Users and Data <input type="checkbox"/> Online Help System <input type="checkbox"/> Scalable, Best Fit Database Platform For the Job <input type="checkbox"/> Real-time Integration with Other Applications	
Telemarketing/Telesales <input type="checkbox"/> Call Planning <input type="checkbox"/> Call List Assembly <input type="checkbox"/> Dynamic Branch Scripting <input type="checkbox"/> Call History & Statistics <input type="checkbox"/> Auto-Dialing <input type="checkbox"/> Productivity & Performance Analysis <input type="checkbox"/> Literature Fulfillment		