



10 Strategies for CRM Success

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Summary

The goal of this paper is to provide thoughts and guidance for those who are thinking of implementing, upgrading or improving their use of a CRM system. The topics covered are things to think about; to possibly guide your hand or provide perspective with regard to strategy. If you are able to successfully incorporate a strategy for all the topics raised in this document you will most certainly give yourself a better shot at a successful project. It is important to note that the goal of this paper is not to tell you which system to use, and it doesn't delve far into the technology or detailed project management associated with a CRM system implementation.

My CRM experience includes 10 years working for organizations that develop CRM and related software applications, but perhaps more importantly I have also managed sales teams for 20 years, and been responsible for the implementation and day-to-day use of CRM systems. Despite (or perhaps because of) my background I am not a technophile. I take a strictly utilitarian view of software and technology. This practical approach coupled with real-world experience has taught me much over the years, and hopefully this experience will result in a nugget of wisdom or two that provides value to you and your efforts.

Again, this is not a discussion about technology. My company, Vantage Software, sells CRM applications so of course I am biased in certain ways. But I have seen and been part of both successful and unsuccessful implementations that leverage a wide variety of different platforms and providers. One important note with regard to technology, however, is the huge difference between contact management systems and enterprise CRM systems. Know the differences between the two and be sure of which one you need before you get into your project. My experience has been primarily with enterprise CRM and it is that side of the fence that this document addresses.

10 Strategies for CRM Success

1. Place the proper amount of emphasis on up front on planning

We are starting with a boring topic, and one you have probably heard before. But yes - it is first for a reason. No other single factor will have greater impact on your success than proper planning. This means documenting what you are setting out to do. This planning should take into consideration all that follows in this document plus a lot more. Clear understanding and documentation of goals, who is responsible for what, and myriad other details before you begin working with software might seem like the expensive way to approach things, but just trust me.....it is far less expensive in the long run.

Action Item: Properly plan document the entire project before you start!

2. Secure executive support

It is pretty simple; you should have support for the project and its goals at the highest levels possible. At the very least, support must be secured at a level that has managerial control over all participants involved with the system's implementation and use. If you do not have this level of support you must be very careful to raise and document your concerns. You do not want to be left holding the bag when things go awry because some key participants within your firm don't wish to participate and you can't make them.

Action Item: Don't move forward without proper executive sponsorship!

3. Do NOT try to do too much

Broadly speaking, CRM is such a great concept that could potentially provide so much value in so many ways. Do not fall into the trap, however, of trying to do too much, especially right out of the gates. Figure out the one or two most important objectives you are trying to accomplish as an organization and concentrate on achieving those goals first. If you are successful, you can always build on that success later. Of course you should have a long term plan in place and design the system wherever possible to support longer term goals, but don't go for the 'big bang' approach from a functionality standpoint.

Action Item: Figure out what is most important and get that piece right!

4. Make the system easy to use and accessible

The system will only be used if it is easy to use and accessible. It should be designed and configured faultlessly to serve industry specifics and workflows of its intended users, with nothing extra to cause confusion or get in the way. And users must have easy access. To put it bluntly: make sure the system is web-based and integrates extremely well with Outlook. Also- consider accessibility from a mobile device as a requirement if your users travel or often away from their desks.

Action Item: Make the application as simple as possible, relentlessly relevant and accessible from wherever your users may need it!

5. Manage from the reports in the system

Lack of integration between the day-to-day management of staff and the key reports from the system, for whatever reason, is a negative indicator. The system should be designed so its functionality is part of daily lives and operations. The reports should be amongst the benchmarks by which company and individual performance is monitored and measured.

Action Item: Make the system part of your user's daily performance or evaluation metrics!

6. Don't ask people to use something you are unwilling or unable to use yourself

Not everyone is going to be involved with copious amounts of mundane data entry, but there is a direct correlation between how high within the organization daily use of the system is expected and the success of the overall effort. Stated another way, if you (or other senior managers) cannot figure out how to use the system effectively or if there are just plain easier ways for everyone to accomplish their goals without using the system then you should stop and consider why.

Action Item: Make the system simple and useful enough that you and senior management are able and willing to use it!

7. Add value or make life easier in some small way for everyone who touches the system

Include functionality within the system that some how, some way, adds at least some value for each and every constituent who is expected to use the system. CRM will be considered an administrative burden by many who are asked to use it. Keep in mind that it is also supposed to be a productivity tool as well. Take the time to look at the system from the point of view of all who touch the system, not just managers and executives who will rely on the reports the system produces. If you take the time to make sure there is something of value for everyone who touches the system, something that makes their lives easier, you will increase participation and your chances of a successful project.

Action Item: Think about the system from the different user's perspectives, and try to give them at least one thing they find useful!

8. Avoid duplication of effort and encourage automation

If you ask someone to do any task twice (anything!) simply to accommodate your goals you are sure to face hidden or outright animosity and a hail of bullets every time your back is turned. Do the necessary homework to find duplication of effort and remove it. On the subject of automation - computers do certain things very well and very quickly once data is digital, so look for ways to harness the power of automation. Any time one of your users looks at a program for information to re-key into the system (or vice versa), do the homework to see if this passing of information can be automated. It isn't always easy, but watch the magic when you can make it happen.

Action Item: Maximum automation, zero duplication!

9. Data migration from legacy systems is the most likely place to go over budget

Never, never, never underestimate the time, difficulty and expense of what you are about to embark upon with a data migration. It is difficult, tedious, frustrating, and requires total understanding of both past business and future requirements. When you are in the middle of it you will feel like you are so close, and yet so far, all at the same time. During the process everyone blames the software for the data issues unfairly. Enough said.

Action Item: Budget the time, data, expertise for the data migration, then add 25%!

10. Consider tying proper use of the system to staff compensation

And lastly (but perhaps most importantly), consider tying effective use of the system to compensation. I understand that this might seem foreign or controversial but there are a host of reasons why people will resist using CRM systems, or at least using them effectively. Data entry takes time. Some people consider the information as 'their' information. Many people hate technology. Tying use of the system to clear metrics, reports and compensation plans removes any ambiguity around the use of the system and just how important it is to the organization. All feelings and/or personal relationships are removed from the equation. In short, it makes everything way easier to manage.

Action Item: Avoid complications- tie it all back to comp!

Conclusion

Hopefully this paper was interesting; the ten topics chosen definitely represent hard-won knowledge. We use these and other principles as part of the guidance for our work and they have contributed strongly towards successful project work. If you have questions or would like more specific materials to support the subjects covered we welcome further conversation.

Please contact us at www.vantage-software.com or 617-454-1400 for more discussion. I can also be reached directly at dsayles@vantage-software.com.

Thank you and good luck!