



CRM: 9 essential tips for success

Mark Britton, Marketing Manager for Technology Management offers some lessons on implementing Microsoft Dynamics CRM 3.0

After all our talk about the latest version of Microsoft Dynamics CRM, it was about time, as my boss would say, to 'eat our own dog food'.

At the time of going to press, Microsoft's customer relationship management (CRM) software will have been live at Technology Management for over a month. And my verdict in a nutshell: fantastic! But, the implementation wasn't without its teething problems.

Enabling technologies and the thrust toward a customer-centric business focus have brought CRM applications to the forefront as a viable approach for increased competitiveness and profitability. However, the success rate in realising potential benefits from CRM projects is sometimes lower than expected. In this issue I highlight common pitfalls you can avoid, with examples of what Technology Management faced when we implemented Microsoft Dynamics CRM 3.0. Here are my nine tips for success...

1

Get management buy-in

If management doesn't believe in a new CRM system, why should employees? Support throughout all echelons of upper management affirms the company's commitment to the project, which

will motivate all stakeholders below management. Many times the difference between a successful CRM implementation and a waste of money is a manager who realises the value of the product, understands the problems it's going to solve, and dedicates time and energy to making it happen.

2

Involve employees early on

Employees using the system 'in the field' will soon find system shortcomings that managers may not necessarily plan for. Gain employee feedback early on and it may save time and money later on trying to reverse engineer the system to accommodate last minute changes.

For example, by listening to feedback from our telemarketing team, Technology Management is adapting CRM so that the visibility of call notes and an account's history is improved to meet the user's needs. This suggestion will increase the call rate, improve the quality of calls and make the system more user-friendly.

3

Align strategies

Each department, whether it's a call centre, marketing team, or sales force, has its own requirements and goals. They are also, however, all

part of an entity that should communicate a consistent message and brand experience across all customer touch points. One of the keys to a successful CRM implementation or strategy is aligning your business and all the customer touch points within that enterprise.

Using Microsoft CRM, we can now create cold calling activities and include, on-screen, key campaign messages, product unique selling points (USPs) and competitor intelligence as a guide for the telemarketing team when they're making calls and communicating an offer. This helps ensure our messaging is accurate and consistent with other marketing activities across the life of a campaign.

4

CRM is not a magic bullet!

The mantra here is strategy first, technology second. Technology is not a good driver of a CRM strategy, but reorganising business process efficiencies and bolstering revenue are. Find out how your company's customer touch points can maximize those ideas, then give customers applications that work with them.

The software is only there to enable implementation of a CRM strategy, not the other way around. Technology is a pillar of CRM success, but it's only one pillar. ▶

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5

Start small and plan wisely

Remember, the business is on a learning curve in applying CRM.

Try starting small, following the KISS (keep it stupidly simple) rule. This is an old but successful approach technique to dealing with new things.

For example, Microsoft CRM 3.0 has so much functionality that Technology Management chose to use only a small part of it for now. Over the coming months we'll be introducing the service tools and the more sophisticated opportunity management functionality to track the sales pipeline. But for now it's a matter of everyone becoming familiar with the interface and understanding the importance of recording the right information in the right places. Introducing further pieces of the product in the future will then feel like small steps for users and not giant leaps.

When choosing your CRM software partner, consider where your company is heading. Will your partner and their product be able to support your CRM ambitions further down the line? For example, you may wish to integrate your system with your website or your financial management system.

6

Clean data, then allow plenty of time to migrate it

Behavioral data is the lifeblood of CRM, so make sure it's accurate.

Many organisations overspend on technology implementations and bypass this critical first step in gaining an accurate view of the customer. Before implementing a solution, bring the data into a unified database, cleanse it to remove multiple entries for the same customer, ensure that the data is accurately distributed to all customer touch points, and standardise your databases so customer information is presented accurately throughout the entire organisation.

Once the data is cleansed, allow enough time to import it into your new CRM system. For example, Technology Management had an unforeseen difficulty with accurately transferring contact notes from the previous system.

This seemingly straightforward process held up the project by several days.

7

Don't leave training until the end

Training is often considered the last component of an implementation. Training receives the least funding and results in end-users receiving a new application at the last minute. Give your end-users as much time as needed with the new solution before going live—it makes the transition that much easier. Training should begin immediately following integrator and software selection. The sooner training begins, the sooner end-users realise they're part of the process and the quicker they realise the benefits of the application. Also, the training curriculum needs to mirror the business processes of each department.

Members of Technology Management's sales and marketing team were given access to the software with dummy data on it several weeks before the project started. This allowed them to make more informed suggestions when a strategy for tailoring the system was being formulated.

8

Choose a champion of change

When making a full-suite implementation, start with a single department and let the dominos fall into place. Choose a department with a manager who's behind the implementation, realises its benefits, and whose department will also find the most success early on. Nothing jump-starts a CRM implementation more than a manager who always has that can-do attitude. Once other departments begin to see this success, they should follow suit.

9

Plan for disruptions

Companies change. They make acquisitions or they get acquired, sections are sold off or outsourced, and staff get replaced. When implementing CRM, these are changes that

management must be ready for. A firm can reorganise its sales territories or replace its CRM project leaders, which can have a significant impact on its CRM strategy.

Many times projects are planned to be completed in 90 days, but all of a sudden it's day 120, because at day 45 there was a shift in the nature of the business. That's nobody's fault, it's just a part of doing business. It's going to happen, but management in charge of any CRM implementation have to take this into account. They can't plan in a vacuum.

Conclusion

This article has outlined a number of potential problems and pitfalls that could be encountered by those setting out to create a CRM project application. Because of varying degrees of experience and expertise, no one organisation will necessarily encounter all of them. By accounting for these potential pitfalls, not only will it be possible to avoid many of them along the way and complete the journey, but also your business will attain the highest degree of customer satisfaction. @

Test Drive Microsoft CRM 3.0 for 90 days

Book one of our consultants today to install a virtual PC version of Microsoft CRM 3.0 at your premises, allowing you to discover for yourself the power of this groundbreaking CRM software. Included in the visit will be a full product overview.

For further information e-mail crm@tecman.co.uk or call Mark Britton on 01902 578332.