



10 Step Roadmap To CRM Success

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You have just invested into a CRM solution and now it is time to make it work. The challenge is: where do you begin? The executive team has corporate objectives, the managers know what they want out of it, and chances are the sales teams and customer service groups are worried how it will impact on their already over-burdened day. You have the opportunity of aligning CRM objectives with corporate objectives and if this is successfully achieved you will truly see a return on your investment and more.

Before you dive into a CRM implementation, take a methodical approach and develop a strategy that will help you make the solution you have chosen YOUR CRM. Start creating “buzz” and have everyone involved. Get everyone to take ownership in some meaningful way. The “10 Step Roadmap to CRM Success” is based on a proven model and if followed, will help ensure that your CRM solution will meet your business’s objectives, be successfully adopted, and help drive your business forward.

1. Identify Your Strategic Team

Your strategic team will be responsible for communicating with your users and getting feedback on any issues that arise during and after implementation. They can take a role in prioritizing new projects, making sure they will be beneficial in meeting your company’s objectives. As you go through this journey, they will generate excitement and create the culture necessary for user adoption. Think of them as your “CRM Champions”.

Your team should include key stakeholders who can represent cross-functional roles (i.e. sales, marketing, service, sales support). An executive member will also be needed to ensure your initiatives meet the corporate objectives. Don’t forget to include a project leader (BA) on your team that understands your business, its customers and the CRM capabilities.

Tip: Pick team members that have good relationships with their colleagues are respected and are early adopters.

2. Create A Vision & Objectives

Your vision and objectives will be used as the “acid test” during your implementation and to prioritize any future CRM projects or initiatives. Use them to start developing the culture that is necessary for important business change. The objectives must be measureable and support the vision. Make sure that you can validate your objectives using dashboards/reports. For example, one objective may be to increase win/loss ratio of all opportunities by 30%.

Tip: Think about creating an internal marketing campaign to promote CRM and the goals that must be achieved.

3. Identify Pain Points

Identify pain points from each key stakeholder. Create a list. This will be used to help strengthen user adoption by giving some “wins” to each. Remember to check against your objectives and kill two birds with one stone!

Tip: Have any excel spreadsheets that are used by several users to capture critical information? Think about embedding it as a custom object in your CRM. It will save them time and allow you to build metrics from the data captured.

4. Map Business Processes

Mapping out business processes will help you understand how to leverage and properly align your CRM to your company’s overall business objectives and your customer’s needs. Make sure that you work with each business unit and understand what their process is. Review the flowcharts and get sign-off once you have agreement that the process accurately reflects their business flow. Every step should have one owner who is accountable for its success.

Process maps have several benefits. They include: a quicker learning curve for new employees, greater productivity, and a means to automate workflows. All will result in reducing costs. To find out more about the importance of business processes read [“What's Happening Behind The Scenes May Be Holding Your Company Back!”](#)

5. Align CRM To Business Processes

Customize your CRM so that it is aligned to your processes. Understand how the technology can be leveraged (workflow automation, workflow approvals, data validation, etc.) to improve productivity and increase visibility. Make sure you check your objectives to see if they have been met. Focus on the top highest value processes and consider phased roll-outs. Results: quick payback on your investment, quicker learning curve of the application, and less resistance by users to adopt.

6. Import Quality Data

Data quality is critical to CRM success and user adoption. Time must be taken to identify all data sources and ensure data quality and integrity prior to importing into your CRM application.

Tip: Gather all legacy data and place into an excel spreadsheet. This will give you an easy means to de-dup, improve quality and standardize on formats such as state/province and country codes. You may also want to look at a 3rd party tool such as [DemandTools by CRMFusion Inc.](#) if you have a large amount of data.

7. Create Powerful Analytics

Creating reports and dashboards will help ensure your checks and balances are in place. Make sure that you have KPI's and other metrics that benefit your executives, managers, and users. Generate metrics to help track user adoption, track if you are meeting your objectives, and monitor data quality.

8. Test Before Release

Test, revise, and test again using a small pilot group that represents each business process owner. Gather information and recommendations that they offer to help streamline and make your CRM application as foolproof as possible. This step will minimize catastrophes during training and in the first few weeks after deployment. Make sure that your pilot group is "onboard" as they will spread the word as to their thoughts on this new system!

9. Train Users

Make sure that all key stakeholders and users understand how to use your CRM application. This not only includes "rules of engagement", but also the terminology of the data, especially in pick lists. This will help ensure that your organization captures accurate data resulting in accurate analytics which is crucial to user adoption.

Tip: Create a CRM guide and worksheet for each group (i.e. sales, marketing, and service). The worksheet should include exercises that are relevant to their required CRM tasks.

10. Review & Evaluate

CRM is a long term solution that can grow with your organizational and customers' needs. Make sure that you look for continual improvements and projects that will add value to your business. By thinking and breathing "CRM", your organization will get great value and success from its use.

Last Note: User adoption is the biggest reason for CRM failures and your sales team will be pivotal to whether it is successful and meets your objectives. Get them involved early and remember, without their backup and 100% belief that CRM will help them and their customers; you will never achieve all you can from your CRM investment.

About CRM Connect

CRM Connect is a CRM business consulting firm who supports small and mid-size businesses plan, implement and manage their CRM initiatives. We are dedicated to helping our clients work smarter, work better and get the most out of their investment. Think of CRM Connect as your "go-to" team when you need things done. Whether you are just getting started with your strategy and implementation, want an assessment of your current CRM affairs, or you need a helping hand, CRM Connect will work with you to make sure that your objectives are met.