

## 18 Requirements for Business Success with CRM

**Organizations rarely go it alone when they implement a Customer Relationship Management (CRM) strategy and its supporting technology.** That's because it can get overwhelming: business strategies, technology, budgets, operational processes, change management issues, and more.

Good CRM practices and principles apply to companies across many industries. One **core tenet** of CRM is **customer centricity**.

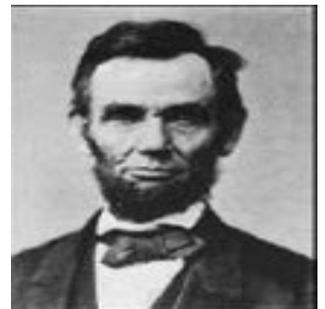
Companies must instill a customer-centric focus throughout the organization to make a CRM initiative successful and to get the most **"bang for the buck."** Essentially, companies must not only **focus on cutting costs and improving productivity**, they must **also enhance the experience of customers across all customer touch points**.

See also the **Common themes for business success with CRM** blog post [here](#).

**To obtain the success you deserve with CRM- consider the following requirements:**

### 1. Get Executive Buy-In

Management must believe in a new CRM system and lead by using the system themselves. Support throughout all echelons of upper management affirms the company's commitment to the initiative, which will motivate all stakeholders below management. **Success will come for a manager who realizes the value of CRM, understands the problems it's going to solve, and dedicates time and energy to making it happen.** It's incredibly important to be involved directly.



### 2. Establish Measurable Business Goals.

Define specific business benefits that you expect the CRM initiative to deliver. Is it to decrease the customer churn rate or decrease the sales cycle time by a specific percent? Is it to increase the win-to-loss ratio of sales opportunities? Maybe it's to decrease the time that a service/support request is unresolved.

### 3. Let Business Goals Drive Functionality

Will a particular feature help your company better serve customers, improve efficiency in business processes, and lead to results that over-achieve the goals? Convert that big list of 'features' to benefits you hope to obtain by achieving the desired goals.

### 4. Avoid Automating Chaos

CRM Project leaders need to gain a [360-degree](#) view of their own business first. Which business processes need to be rebuilt or simply need a little touch-up? What derails CRM initiatives very often is the lack of focus on the people and business processes.



Make sure you are not using technology to automate the same old 'cow-path'.

### 5. Consider All the Stakeholders Affected by the System

Understand what everyone stands to gain or lose. **Actively involve end users in the solution design. Solicit and act upon end user input** by providing WIIFT-- "What's In It For Them." A change to being ["customer-centric"](#) from product- or operations-centric involves management of the change process among all users. Make sure the whole team knows what it means to deliver customer value.



### 6. Align All Departmental Strategies

Each department, whether customer service, 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. Make sure all your departments' strategies converge on the customer as you intend.

### 7. Strategy First, Technology Second

The software is there to enable implementation of a CRM strategy, not the other way around. **Reorganizing business process efficiencies and bolstering revenue are good drivers** of a CRM strategy. Find out how your company's customer touch points can maximize those ideas, then give customers applications that work with them.

### 8. First, Use as Much Out-of-Box Functionality as You Can

Then customize for additional needs. **By getting up to speed with core functionality you get faster ROI.**By learning the CRM's functionality you'll be able to determine if there is a business process that needs changing or if customization is required. Refer to #4.

### 9. Use Experienced, Expert CRM Consultants

Your business success comes from knowing what you do best. Likewise [CRM consultants](#) live and breathe CRM and know what works and what doesn't. Ask the [expert](#) when faced with a problem, whether it's customization, functionality, or deployment strategy. CRM-specific knowledge will produce ROI faster.

### 10. Communicate, Communicate, Communicate

Keep people informed of the goals, objectives, and progress. People feel better during the management of this big business change if they know what's going on. Communicate the "quick wins" as they occur to fuel enthusiasm.

### 11. Invest in Training

Training helps to empower end users and helps them become involved. Training should not merely focus on demonstrating how to use the software's features. Instead, **training should teach employees how to effectively execute the business process enabled by the CRM system.** Give your end-users as much time as needed with the new solution before going live - it makes the transition much easier. Over time, additional reinforcement training will provide even more benefits.

### 12. Phase-In the Roll-Out

Focus each phase on a specific CRM objective that's designed to produce a "quick win" - that is, meaningful results in a reasonable amount of time. Smaller, more manageable phases can yield more momentum and higher end-user adoption. You're building a holistic approach, using a step-by-step process.

### 13. Start with and Maintain Quality Customer information

Behavioral data is the lifeblood of CRM. CRM requires accurate customer information, so start by cleaning up any migrated data and duplications. Do this before a roll-out. Make it easier for people to tackle the tough job of data quality, access, and maintenance.

Enhance personalization by identifying the customer's [social network](#) links - identify their [LinkedIn](#), [Facebook](#) and [Twitter](#) handles.

### 14. Minimize Financial Risks

It's important that executives come to grips with the fact that CRM is not a one-time investment. As more and more users access the system, additional functionality will be found useful and other benefits become evident. **CRM is a journey not a destination.**

### 15. Consider Migration Paths

Understand where your company is heading. Make sure the software vendor you've selected can provide the additional functionality you might need in two or three years. Select one that will enable your CRM software to grow as your company grows. **Make sure it can be customized for your business and personalized for the desired customer's experience.**

### 16. Plan for Disruptions - Companies Change

Companies change. They make acquisitions or they get acquired, sections are sold off or outsourced, and executives get replaced. When implementing a CRM strategy, management must be ready for these kinds of changes. Refer to #15.



### 17. Measure, Monitor, and Track

Once the system goes live, your company must measure, monitor, and track the system's effectiveness, **with an eye to continuously improving performance.** Changing behavior is a long-term process, so monitor to track progress.

### 18. Choose a Champion of Change

When you're making a full-suite implementation, start with a single department and let the dominoes fall into place. Choose a department with a manager who's behind the implementation, realizes 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.** CRM success can be contagious.



Dick designed and coded his first customer management system in 1983, later adding in sales force automation and integrating the accounting system.

Today's commercial CRM software solutions, such as [Sage ACT!](#) and Sage [SalesLogix, now](#) provide the business processes and functionality for [multiple business benefits](#) so you can truly achieve faster success with CRM.

Additionally [e-marketing](#) helps your business stay "top of Mind" and integrated [quote](#) management helps you get your proposal quickly in front of prospective buyers.

See also the [Common themes for business success with CRM blog post here](#). Our firm offers [CRM readiness analysis](#) and [CRM optimization consulting](#) services so you can grow your business faster and have a more integrated, effective system.