8 best practices for a successful CRM implementation

When done right, CRM can help you better understand your customers and respond quickly to their shifting desires

Customer Relationship Management, or CRM, describes the processes, approach, and tools for managing a company's interactions with customers, and storing and analyzing data about past interactions. Less formally, it's described as a process companies use to understand their customer groups and respond more quickly to their evolving needs. But for all the literature and emphasis placed on CRM, why is it that far too many CRM initiatives go awry? More important, what can your organization do to help ensure that its CRM efforts bear fruit? Below are eight best practices, gleaned from interviews with CRM vendors, users, and experts, outlining how to help deliver a successful CRM implementation.

Clearly identify your pain points and goals

Many organizations embark upon CRM without clearly defining why they're doing it, which makes it very difficult to assess progress and success. So at the start, ask yourself: what is driving your need for CRM? What do you hope to accomplish? What problems will it solve, and what processes can it improve? Addressing these questions up front will help you identify and set realistic goals, and establish metrics that will help you measure progress and success.

Understand how users work

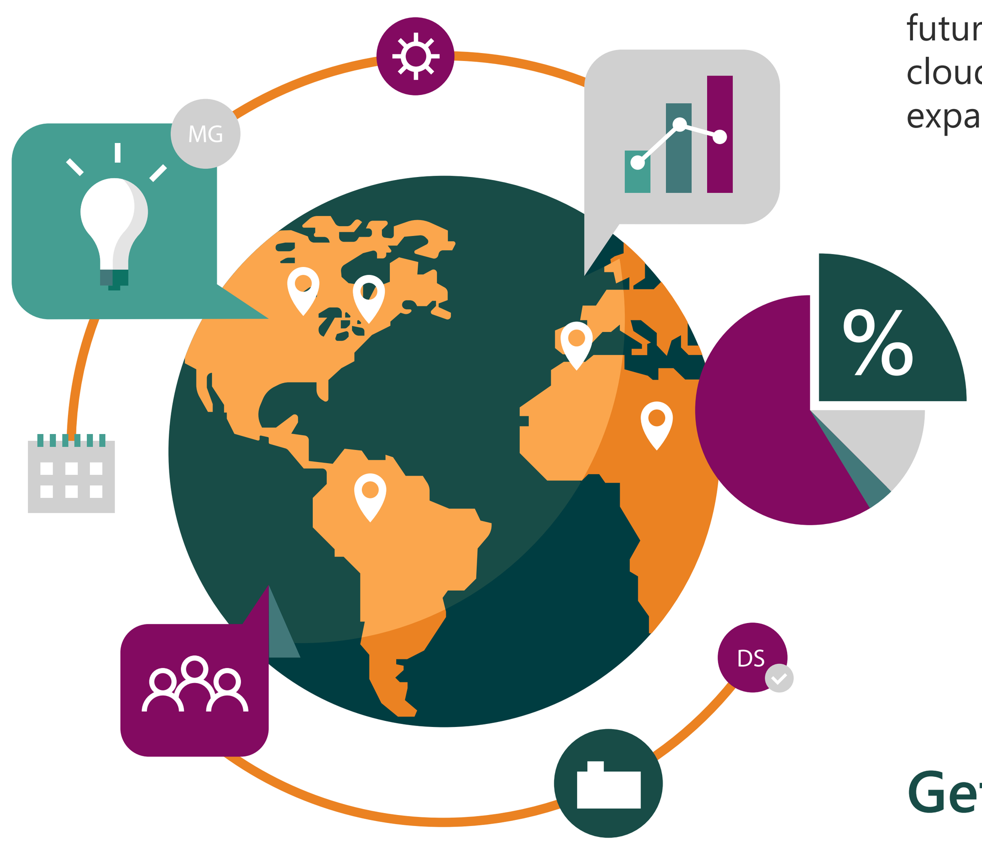
When choosing a solution, survey a cross-section of your CRM users—from sales, marketing, IT, customer service, and finance—to understand how they work, why they work that way, and how they'd like to work in the future. Doing so will help inform the look and feel of your CRM, which in turn will help ensure smoother company-wide adoption.

Vet prospective vendors by asking tough questions

Choosing the right vendor is arguably as important as choosing the right CRM, so be sure to glean every available detail about them: industry experience, responsiveness, clients, partnerships with major tech companies, and maintenance and support levels. This last detail is especially important: always ask how much training and support a vendor provides, and whether they have outstanding help and resources. Keep in mind that training goes beyond the end user of your CRM—it also involves technical updates that your developers and IT may have to make further down the road.

Make sure your system can customize, personalize, and scale for the future

When evaluating a CRM platform, think beyond your immediate needs and assess whether the solution can scale and grow with your business in the future. Many organizations are opting for a future-ready platform that houses data, software, and services in a secure cloud environment, since a cloud-based CRM system can easily and affordably scale up as your business grows in size and expands geographically.



Roll out the solution in phases

Deploying a new CRM is a balancing act between time, functionality, and value. Too much too soon, and users can get overwhelmed; too little too long, and people can lose interest or the project can get canceled. Thus it's important to plan your CRM rollout in phases, making sure that each user group gets up to speed on the current phase before moving on to the next one.

Get executive buy-in

It perhaps goes without saying, but when adopting a CRM, get the entire executive team onboard from the start so that they can articulate to everyone across the organization why adoption of the new tool is both critical and necessary. In most cases, executives and executive buy-in are the key to driving CRM adoption among front-line employees.

Provide proper training and support

Because CRM involves change management, training is not only essential, but also requires a customized approach for both groups and individuals. For example, marketing training should focus on areas like contact segmentation, list building, event management, and reporting; data teams, on research and data-quality best practices. Keep in mind, too, that CRM is technically not a project or initiative with a definitive end, so training needs to be ongoing and persistent.

Automate processes

As one of CRM's most important features, process automation is ironically one of its least utilized. Simply put, automate as many processes as possible. For example, sales and service reps should be focused on engaging customers, not on tracking down specific information or what to do next with each customer—the system should already be doing that for them. The more that workflow can be automated, the better it can guide users to the next best action for each customer—which drives adoption and use of the system and, in turn, the overall success of the implementation.

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