Planning a CRM?

A Guide to a Successful Implementation

Implementing a CRM system can be a challenge, especially for small and mid-size organisations that have limited or no IT staff or expertise. This guide is designed to help organisations navigate and mitigate common pitfalls experienced when choosing and implementing a new CRM system.

1 Ensure Leadership

For any CRM project to be successful, there must be buy-in from the leadership team. They need to be clear about what a new CRM needs to deliver and how that should benefit the organisation. If the leadership team do not understand how important the project is then nobody else will.

2 Appoint a Project Manager

CRM projects often go over budget, aren't delivered on time or do not properly meet the organisation's needs. A good Project Manager will help to mitigate these risks by planning and managing each stage of the process, from design through to delivery (and incorporating the guidance in this document).

3 Set Objectives

While it may be obvious that you need a CRM, it is important to be as specific as possible about what you want to achieve, both initially and longer term. This will help you decide which system is best for your organisation.

When setting objectives, it helps to categorise them:

→ **Must haves:** critical to success (the non-negotiables!)
→ **Should haves:** important, but not necessary or time critical (so could be added later)
→ **Could haves:** desirable but not necessary (can include if time and money allow)
→ **Won't haves:** ensure all stakeholders aware of what won't be included (to set expectations early on)

Different teams will have different priorities and these may compete with one another. Being clear on the overall goals will help to resolve these conflicts.

Establishing how you will measure results against objectives will enable you to demonstrate the impact the new system has had.

4   Choose the right partner

There are many different systems/providers out there and all have their strengths and weaknesses. Assess all systems against your objectives (see point 2) to find the one that best meets your organisation's individual needs. Also consider:

→ Your budget - a limited budget may restrict your options
→ Your own competencies - what can you do yourself and what do you need expert help with?
→ Do you need help with design and implementation, if so how much?
→ Do you need user training?
→ What format is your current data in and how will you migrate it to the new system?
→ What level of ongoing support do you need?
→ What experience does the provider have of working with similar organisations?

Your final choice will be a partner that meets your technical and practical needs, understands the nature of your work and can support you at the level you require.

5   Ensure your solution can grow with you

As your business grows, so will your requirements. Where do you see your organisation in the future, and how might this affect your CRM needs? Installing a CRM takes time, resources and money and you don't want to find that you have invested in a system that cannot support you through growth.

6   Identify Champions

Resistance to change is common and can be difficult to overcome. If you have a number of people within your organisation who recognise the value of the project, understand the problems it will solve and are willing to dedicate time and energy to making it happen, it is more likely to succeed.

Your champions might be one team or department, or individuals within different departments. Either way, a 'can-do attitude' will motivate others and once they begin to see success they are more likely to follow suit.

7   Get users involved from the start

While it's important that the leadership team are driving the initiative, the people who are most affected are the users. They are also the ones who understand the day-to-day processes – in many cases they are your process experts. By involving users early, they will:

→ Feel more involved in the decision making process
→ Provide valuable information which will aid system design
→ Identify any issues early on
→ Help avoid any costly mistakes
→ Realise any benefits to them sooner
→ Be less resistant to change
→ Be more likely to want the project to succeed (and invest time in ensuring it does)

8	Review processes in line with new CRM

CRM projects are started because the existing systems and processes don't deliver anymore. Simply replacing technology and not reviewing processes is unlikely to have maximum impact. When implementing a new CRM solution, seize the opportunity to review and improve your processes.

Again, user engagement here can be key. Many processes run across departments or functions. It makes sense to get teams together to discuss how processes can be improved. Ask:

→ Why do we do it this way?
→ Are all the factors involved in a process still relevant?
→ Are there opportunities to improve or automate any processes?

9	Make the most of your data

As well as enabling you to carry out your day to day activities, your CRM will collect an abundance of data. Used in the right way, data is invaluable to your organisation; it can help you make informed decisions, be strategic in your approach, demonstrate your impact and highlight problems/find solutions.

Think about:

→ What you collect (only what you need, nothing more, nothing less),
→ How you maintain it (put processes in place to ensure it is kept up to date)
→ How you process/report it (convert it into intelligence)

10	Finally...

Implementing a new CRM can transform the way organisations operates. It can control and integrate processes across functions, improve communications with stakeholders and help organisations run much more efficiently.

However, technology is the enabler, nothing more, nothing less. A CRM project requires a focus on technology, people and processes to deliver optimum results. Take the time to follow the guidance above to deliver maximum benefits for your organisation.

GMCVO

Databases

☐ **Ensure Leadership**

....

....

☐ **Appoint a Project Manager**

....

....

☐ **Set Objectives**

....

....

....

☐ **Choose the right partner**

....

....

☐ **Get users involved from the start**

....

....

☐ **Ensure your solution can grow with you**

....

....

....

☐ **Identify Champions**

....

....

☐ **Review processes in line with new CRM**

....

....

☐ **Make the most of your data**

....

....