simple guides

**Maximizer Software**
Simply Successful **CRM**

# How to: Implement a CRM System

Whether you choose an on-premise vendor or hosting provider, remember that the success of a CRM (customer relationship management) or SFA (sale force automation) solution is in implementing your customer-facing processes and effectively training staff to use the system to its maximum benefit. Selecting the right vendor when implementing the CRM system properly will yield great returns on your investment with better staff productivity, improved management visibility, greater customer relationships and ultimately, increased sales.

Today, most people responsible for CRM projects understand that they need to obtain leadership buy-in, re-engineer business processes and manage change. The three key areas for CRM, whether preparing to install a system for the first time, or looking to revitalise an existing application should focus on establishing strong CRM project leadership; analysing and improving business processes; and managing change. Here are seven tips to help you get on track:

## 1. Establish CRM Leadership – start at the top

Implementing CRM processes and technologies that support them is a consequential undertaking for a company of any size and results in many fundamental changes to the way business gets done. As a result, it is imperative that one or more top executives support and champion the initiative.

CRM champions – including the directors marketing, sales, and service – should present the business case to other senior staff, secure sufficient funding and arbitrate change. Because CRM impacts processes and people in many different parts of an organisation, including marketing, sales, customer service, operations, and IT, you need executives who can see the forest for the trees – who understand what makes sense for the organisation as a whole, not for just one department.

The most successful CRM implementations include multiple senior sponsors and are effective because they provide a more complete understanding of current processes and can set better overall objectives. Collectively they carry the political influence required to drive change throughout the organisation.

An initial task should be to market the CRM implementation project internally. Sponsors must give the project credibility and validate its importance to the business by providing information about its goals and objectives and the benefits to the entire organisation. And once accepted, you should create a project planning and deployment team, made up of a mix of senior managers and end users.

When project objectives are set, each objective must have measurable outcomes and thresholds that define success. Building key performance indicators into each objective helps prioritise implementation tactics down the road. It also helps demonstrate progress towards goals.

## 2. Analyse business processes

To begin with, document existing customer-facing business processes. The list of processes can be extensive and might include marketing campaigns, lead processing, sales pipeline management, account creation, invoicing, customer service issue tracking, time billing, and return processing. You should interview key stakeholders across all the departments involved.

It is also useful to survey users to gain an understanding of how they feel about existing processes and systems. Are they efficient? How can they be improved? Can we identify any steps to eliminate? This will identify weaknesses in current processes for improvement in the solution.

**For More Information**
Contact us to learn how we can help you accelerate your CRM success.

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As you document existing processes, assign each a value. This will guide your ability to jettison some processes, or keep them and refine them. Determine whether each business process is necessary, relevant and useful. Is it based on documented best practice – or just done that way because no one wants to change?

Once you have defined and categorised each business process, you can model how you would like the system to work.

### 3. Learn about the CRM solution's functionality

Today's CRM solutions come loaded with functionality – so much in fact, that even well-established systems are open to significant improvement. Map features and functionality in the software to current and planned business processes. As you tour the software in depth, note in particular, places where the software does not support your current processes. Should the software be modified? Or should the process change?

Go with the field reps on a 'day in the life' trip to fit your CRM or SFA application into their work style, and even better – to improve the productivity of their current work day.

Identify in each area – marketing, sales, support, service – which reports you would like to generate to measure specific business performance indicators. There may be reports that cross departmental boundaries. List them in their order of importance.

### 4. Manage change – and communicate

Change management is important because CRM impacts every single employee who works with customers. Industry analysts at Gartner estimate that 75% of the challenge of building better relationships with customers depends on change management – not on technology.

For change to succeed, people first must understand the need. Pay systematic attention to people issues – many are resistant to change, even afraid of it, so it is important to identify these issues and work to address them.

A well thought out communications plan starts with getting staff excited about the business objectives – for example, servicing customers better to create a competitive differentiator. Then, clearly demonstrate how those business objectives can be achieved through CRM.

The energy that drives customer-centric firms is the loyalty, commitment and enthusiasm of the workforce. By making it clear to employees how the new or improved CRM technology will help them to be more effective in serving customers in the long run, and efficient in their jobs in the short term, an organisation can enhance the willingness of its workforce to adapt.

### 5. Train, train and then train again

Of course, no amount of money invested in new devices and applications will automatically deliver the desired business boost. To ensure the success of CRM, training should begin well before launch and then be delivered on an on-going basis as the system evolves – as well as cater for new people joining the company down the line.

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### 6. Assess performance

How will you know if your CRM implementation or refresh has been a success, unless you establish and monitor measurable performance indicators?

Set quantifiable business performance metrics, which typically might include:

- Greater percentage of deals won
- Reduced sales cycle length
- Increased deal size
- Reduced cost of marketing
- Decreased customer complaints
- Number of support calls / visits per day
- Reduced transaction times
- Increased number of transactions processed per day
- More employee CRM system usage per week

Other less quantifiable measures may include:

- Increased employee satisfaction
- Increased customer satisfaction

Soft metrics may best be derived by 'before and after' experience comparisons using spot surveys over time with customers, employees and other users of the CRM system.

### 7. Keep up to date

It also makes sense to review regularly, on the basis that no business stands still and your CRM solution must be fine tuned and modified in line with developments. So whether installing CRM for the first time, or looking to revamp an existing system, following these general principles will help ensure that you get the best out of your application – and the best return on investment.

Those organisations that get it right will find that CRM helps ensure that current customers are looked after impeccably – great for growing revenue from an established customer base – while winning and retaining new-name business.

### About Maximizer Software

Maximizer Software is the world's leading provider of affordable and easy-to-use customer relationship management (CRM) software applications. The Maximizer line of products help companies develop more responsive, personalised and profitable customer experiences. Built on a modern, Web-based architecture, Maximizer is easily integrated with existing corporate systems and features the latest in sales force automation, marketing automation, e-mail marketing and customer service technologies in a single mobile-accessible business management system. Maximizer Software has sold more than one million licences of its award-winning software solutions to companies ranging in size from entrepreneurs to multinational organisations. Customers include: Siemens, Société Générale, HSBC, TD Securities, Lockheed Martin, Brian Tracy International, Fisher & Paykel Healthcare, Oxford University Press, and Cathay Pacific.

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