The 11 Step Plan for CRM Success

There are some statistics for CRM that give it a bad reputation:

“70% of CRM initiatives fail to achieve their expected objectives” - source Cap Gemini Ernst & Young

“90% of businesses can’t show a positive return on CRM” - source Meta Group

“75% of CRM initiatives fail to substantially impact the customer experience” - source Gartner

But these numbers fail to highlight a very crucial point, they refer to CRM initiatives that lacked an effective implementation strategy.

When it comes to CRM the strategy is often the difference between failure and success.

Without a committed and well developed plan the project is destined to fall short of expectations.

But how do you develop that strategy?

And, what support will you need?

In this document we’ve outlined 11 essential steps for developing a bullet-proof CRM plan.
1. Build a Project Team

It's essential to secure CRM buy-in across the business, starting at the top with board level management support that will filter through to the teams on the ground.

Most departments are certain to have an involvement with at least one or more CRM process so it's essential that they are involved in the early planning stages.

Ongoing cooperation and acceptance will be crucial to ensure success.

Use these resources to build a project team who will shape your strategy and define its goals.

A recommended CRM project team will include:

- Executive sponsor
- Project manager
- CRM administrator
- Key users for each team

2. Define your CRM Vision

Why do you want a new CRM system? What will CRM success look like?

Set high level goals that will be your benchmark for the project before determining how your key success metrics will be measured.

Based on projects that Preact has worked, on these objectives frequently include:

- Creating a complete view of each client relationship in a single application
- Improving the quality of management information reporting
- Developing more efficient business processes
- Increasing lead generation
- Improving account retention and service delivery
3. Prioritise your CRM Goals

Rather than attempting to tackle all of your CRM goals in a single big bang implementation we recommend a phased approach that focuses on quick wins.

Some goals will be more important than others so it’s important to prioritize them and ensure that your plan is realistic, both in terms of your budget and the resourcing that is needed to deliver your CRM implementation on time.

Once early success is achieved CRM momentum will be maintained by focusing on the next phase of your project plan.

4. Map out your Processes

What pain points in your business processes does CRM need to fix?

We recommend mapping out the flow of each step in your current processes to help define how they will be managed in CRM.

This presents a superb opportunity to gain clarity on how well your processes are currently working and identify how CRM can improve their efficiency, often by removing duplication of effort and applying greater process automation.

A specialist CRM consulting firm will provide a wealth of expertise to help you re-engineer your processes by utilizing CRM functions to improve their efficiency and achieve your goals.

5. Consider Reporting Outputs

Having defined your CRM success criteria these, targets should be specific and measurable.

Think about the information that CRM will need to track specific to each of these goals and what reports, charts and dashboards you’ll need to measure progress.
6. CRM Data Capture

Consider which fields you need to track on each CRM record to achieve your goals.

For example, you may be taking a phased approach by leading with an initial CRM sales team deployment so consider what fields will need to be tracked on your records for accounts, contacts, opportunities and leads.

This includes defining what type of fields will be used, for example the options that will appear in drop-down fields, and which fields should be set as mandatory to ensure consistent data quality.

It can be tempting to go overboard but remember an excessive number of fields may prove a barrier to early user adoption and will add to the administration overhead.

7. Prepare your Data

The resources needed to consolidate and prepare existing data for migration to a new CRM system is often underestimated.

To ensure your readiness consider these points:

- What data needs to be imported into CRM?
- Where is it currently stored?
- How good is the data quality?
- Does it need cleansing?
- How far back do you want to go with relationship history data? 1 year, 2 years, or longer...?
- What duplicate matching rules need to be set?
8. Integrating CRM

Which applications will CRM need to integrate with? What direction will the data flow?

If one of your goals is to create a single view of each relationship, integrating CRM with an external data source is likely to be a high priority.

As well as feeding data from other applications, CRM will also push data to other sources, for example to create a new order in the back-office ERP system when a CRM sales opportunity is converted.

Other CRM integrations can include email marketing, web forms, Sharepoint and eCommerce platforms.

9. Managing User Security

Consider how CRM will be shared in your business.

Make a list of the users, roles and groups that will have CRM permissions and define what level of access they should get. For example, do you want every CRM user to export data to Excel?

Flexible CRM solutions like Microsoft Dynamics CRM enable advanced user permissions which can include team and territory management to precisely control which records users are entitled to access and what controls they can use.

10. Identify the Risks

All projects have risks.

Consider the main hazards to your project and how significantly these threaten its success.

The CRM technology could be a risk if the database isn't flexible enough to adapt to your processes, or if the system lacks the scalability to grow with your business.

As we've already featured, the supporting processes represent a risk if these are poorly defined, or if existing gaps aren't identified. Often, the most dangerous CRM risk can prove to be the people involved...
11. Create a User Adoption Plan

The biggest risk to CRM success is low user adoption.

Successful CRM projects engage with multiple users at an early stage to consult for ideas and stimulate interest in CRM.

Visible board level commitment for CRM is a crucial step but often project managers neglect to listen to user needs and fail to build support from the ground up resulting in challenging user adoption barriers to overcome.

It’s essential to remember that a CRM project should only be considered successful if it meets the requirements of its users.

Technology like Microsoft Dynamics is an amazing enabler but without user adoption, understanding and support, even the greatest system in the world will struggle to deliver the expected results.

To develop an effective user adoption strategy:

- Ensure users know why a CRM system is being implemented
- Listen to user ideas, requirements and concerns
- Deliver ongoing user training and support
- Measure usage that focuses on positive reinforcement

There you have it, 11 recommendations to plan a successful implementation that will create CRM driven growth. We’d be delighted to support you on your CRM journey!

About Preact

At Preact, our aim is to help our businesses achieve outstanding success from their CRM system whilst giving excellent value for money. Our core values are to put customers first, be the best and build business together, these pillars are central to the way we behave, both with each other, and with our clients.

Preact has helped all types and sizes of businesses achieve success from their CRM strategy since 1993 and we support over 5000 CRM users worldwide.

Leading with Microsoft Dynamics, we offer help with all aspects of CRM including requirements scoping, project management, CRM integration and training.

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