



10 Simple Rules that should underpin EVERY CRM implementation

- 1 Executive sponsorship** – if the CEO hasn't bought into it – don't do it. It is critical that everyone in the organisation is aware that commitment to the project comes from the top. The commitment needs to extend down to directors and senior line managers. They need to project an image of commitment and support - “we're going to do this and we're going to help you to be successful in using it”.
- 2 External Assistance** – unless you have one of the world's leading CRM experts tucked away in the Accounts Office, don't do it by yourselves. CRM is a big field and its reach is deep into the organisation. Get in people who eat, sleep and breathe CRM.
- 3 Involvement** – you need to get your people involved. Designing and implementing this from a top down approach will be seen as simply that ... management foisting another system on us. Find the middle managers and significant influencers, especially in the sales team, and put them on the design and implementation project. Get their buy-in, make them evangelists, give everyone the feeling of ownership.
- 4 Don't do everything at once** – CRM can have a deep reach into an organisation, especially if it involves sales, marketing and service automation. Implement incrementally to avoid confusion and over extensive change resistance. Do sales first, then service, then marketing (or marketing then service ... but usually sales first).
- 5 Post-implementation Support** – You can train people extensively before the system goes live. But when push comes to shove, people will forget what they were taught and start to use the application in the way that they are comfortable with. This is plain wrong. Unless there is a common approach to the data that needs to be recorded and a common approach to how it is recorded, then the main value of the CRM is lost. So, post-implementation support monitors and mentors users after the application goes live. Those first three months are critical.



- 6 Encourage user feedback and act on it** – Communicate with your users and let them know that not only were they involved with the design of the application, they're also involved in the running of it. User buy-in is as critical as executive sponsorship. Don't ignore users just because you've gone live.
- 7 Don't be rigid** – Even the best implementations will need tweaked in the light of user experience.
- 8 Don't set unreasonable expectations** – You're not going to be a customer-centric organisation the day after you go live. It takes months for data to be accumulated and adjustments to be made in the light of experience.
- 9 Training should be extensive** – half an hour per person is not enough. Every user should attend training before they are allowed access to the system. Ideally training should communicate purpose and evangelise as well as educate. Training should be structured, hands-on, contain exercises to consolidate learning and have opportunities for delegates to ask questions.
- 10 Spend time on Design** – Most CRM applications take the kitchen sink approach. They have fields to capture every conceivable fact about customers and the processes that support them. User adoption will plummet if users have to plough through a myriad of redundant fields to get to the ones that they need. It will plummet even further if they can't reflect the needs of their own business because no fields are available to capture the information. Spend time going carefully through the application (see 3 above) taking out that which isn't needed and putting in that which is and be prepared to change this after you go live (see 7 above).
- 11 Enjoy it!!** - Yes, we know we said 10 rules, but rule number 11 is important too – A well-implemented CRM application will deliver extensive information benefits to you and to your customers. It will improve information flow, process efficiency, customer retention and customer satisfaction. It will make information much easier to find, build collaborative teamwork and reduce duplication of information and effort.

And that's something worth smiling about.