

# CRM Success Tips

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A startling number of CRM implementations are still failing to meet their organizations goals. After over two decades in the software business, we have been able to identify the most common reasons that CRM implementations fail to meet expectations.

If you incorporate even a few of these important steps into your plan for success, you will boost your chances of attaining a measurable return on your CRM investment.

## 1. Don't try to eat an elephant in one sitting

The general assumption is that since CRM software has been around for years, it should be ready to deliver results right out-of-the-box! That may be what some software vendors lead you to believe, but this is wrong. Of course, you can register for a \$10 per user-per month system and start entering data within 5 minutes.

However, if you want to meet strategic business objectives, this tactic will most definitely not deliver them! No matter how much money you throw at a software



purchase or how big the software vendor name is, a CRM software implementation must support your specific and unique business processes before it can really begin to deliver solid results. Don't set yourself up for failure by tackling 10 years of business issues all at once!

## 2. Look for the sweet spot

One of our executives knew of a company with an employee who absolutely refused to use their CRM system. He came up with every excuse. His boss was nearly pulling all of his hair out because this employee was an outstanding asset to the business. He was someone you wanted "on-side". So, the boss decided to try a different tactic. He sat down with this employee and asked him what would need to change about the system to make him willing to use it. The employee told him and the customization was made. He was using the system nearly overnight!



This is what finding the "sweet spot" is about. Talk to your people. Get feedback from your users. Ask them what they need to help them do their jobs better. Then customize the CRM to work their way. Invest money in the development of features and functions that your users want or need to work

together efficiently as a team. Don't get sold on software with flashy demos full of features you will never use.

### 3. Support your people all of the time

Although personal computers have been around for decades, it still takes time for people to learn new software. Today, people are accustomed to working in independent and unstructured workflows. CRM software propels them into a procedural and process-orientated way that they may initially view as “more work.” Don’t make the common mistake of underestimating the time and effort it will take your users to adapt to the changes new software makes in their workday. Train them, support them and at times light a fire underneath them to help them adapt to the new system until it becomes habitual. Never give in or give up on them.



### 4. Don't expect miracles right away

If you are 100 pounds overweight you would need to accept that you can't lose it all by spending only one week in the gym! Many CRM implementations have gone astray simply because of the unrealistic expectation of immediate results. When those results don't appear right away, it's easy for the naysayers to say I told you so.



CRM software is an essential business

tool in today's chaotic business climate. It's likely you've waited a long time to address the business issues that got you going down this path in the first place. By accepting the fact that "long lasting" results involve change and work (both of which take time), you'll remove unrealistic expectations. This is how to pave the way for your CRM success story.

## 5. Not everyone will share your excitement

Not everyone in your organization will be excited about the changes coming. In fact some could become active resisters to the changes they see coming. They may feel ill prepared, or perhaps even fearful of how they will cope. The best way to relieve apprehension is to include users in the process. Elicit their ideas and participation. People need to feel they have control over their work procedures, and they usually have many valuable ideas to share! By getting the users on your side before the system arrives and making them part of the process, you will gain allies as opposed to a gang of resisters.



## 6. Let your creative side out

We all want to believe that software can provide instant solutions to business challenges that have often been festering for years. It's easy to fall for flashy software demos with new and snazzy features that are already thought out for you.



The real value of a CRM software system, however, comes about when the information gathered is leveraged across teams. Then analyzed and acted upon. This process propels the development of standardized best practices, which you can use to

increase business efficiency. Developing creative strategies that work for your unique business will ensure you get the results you wish to see from the CRM system. You'll then gallop toward CRM success.

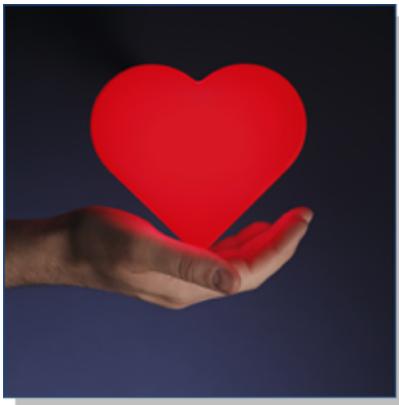
## 7. Make people accountable to one another

Rather than beat people into submission, incorporate processes and procedures that require a team's input to make users accountable to each other. If one person doesn't do their step in the process, others will be negatively affected. This will make a person look bad to his or her colleagues, which no one wants. There's a lot of talk about "management buy-in" in relation to successful CRM implementations, but when users become accountable to each other adoption of the CRM will happen faster than you think.



## 8. Find a leader who loves your CRM

No matter how much money you spend on a CRM system, it simply cannot manage itself! With so much valuable business intelligence being gathered daily, it would be a shame to allow it to fall into disarray. Assign a leader - a "CRM Mama" or "Papa" who will take a degree of ownership over the data integrity and help you drive standardized usage.



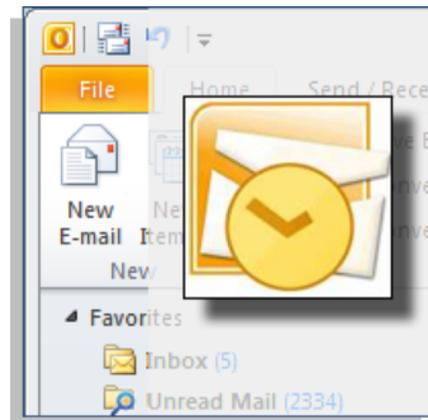
The designated CRM Mama or Papa will ensure the database is primed and ready for immediate action when you need to kick it into high gear for marketing or to ensure that no customer is without a "next step" by their Account Manager. As well, the CRM Mama/Papa will be on the lookout for individuals who aren't pulling

their weight and give them a swift and gentle push in the right direction.

## 9. Find a role for Outlook

A silent challenge to CRM success is connecting the email dot. Email is typically an unstructured data process – but on the flip side, CRM is a very structured data process.

This means that there's a leap that shouldn't be underestimated in regard to user's transitional



challenges. By not determining the appropriate role of email, and relaying this to your users, you will put a potential roadblock in your path to CRM success. Email dominates the communication landscape today and it isn't going away. It's just another business process to figure out and apply some structure to. Letting users make their own decisions on how to integrate the two will ensure they stay with "the devil they know."

## 10. Don't give up half way up the mountain.

If there is one final reason, perhaps more than any other, that CRM implementations fail to meet expectations it is that people simply give up. If you have ever been a gym member and suffered through January and February each year, then you will know what we mean. Those New Year's resolutions keep the gym hopping for about 2 months before things return to normal. When folks don't get the instant gratification they expect, they give up!



The sad part is that they didn't wait long enough to see the fantastic results their gym membership could give them, had they demonstrated a solid commitment and worked toward a realistic goal. CRM systems can deliver unbelievable benefits, including efficiency gains through improved collaboration, access to valuable information for the development of best practices and business intelligence, as well as improved customer service and prospect marketing.

Knowledge comes from information and it's a powerful reason to keep driving CRM processes, procedures and methodologies forward. Even if you have small setbacks or stalls, don't give up. Keep working with your CRM system to maintain your competitive business edge through efficiency gains and business intelligence.

## Practical Next Steps

1. Combine Outlook, Excel and other company records to bring your CRM to life with data.

2. Define achievable processes for your users to kick start them with the new system.

3. Figure out feedback loops that drive value for everyone.

4. Integrate with your Accounting/ERP system for maximum value. Making information available in one location is a powerful way to drive adoption.

5. Don't forget about ongoing CRM support and training. Use these ideas with consistency and commitment.



Don't hesitate to contact us. We are here to help.  
<http://sharepointflex.com> / [support@lookout-software.com](mailto:support@lookout-software.com)