

# How to Successfully Select and Implement a CRM



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## What CRM Can Do

Every business interacts with customers on many levels, with different personnel. Every interaction generates information about customer/prospect needs and desires and your level of success in meeting them. A customer relationship management (CRM) system allows your business to capture that information, which you then analyze; based on that analysis, you can make informed decisions to improve customer satisfaction. You can also use the information to generate more, better-qualified leads with higher selling opportunities.

### CRM:

- Enhances your sales efforts
- Aids in beating competitors
- Boosts success by increasing sales, shortening the sales cycle, and reducing administrative tasks that steal from relationship-building time with customers
- Improves customer retention
- Provides customer intelligence for faster, better-informed decisions.

Business executives are looking for the best of both worlds in CRM solutions – those that offer the financial flexibility and rapid startup of on-demand offerings combined with the data ownership, customization, and security benefits of on-premise applications.



### On-demand CRM offers several benefits, including:

- Reduced software maintenance and hardware costs
- Operating vs. capital expenses
- Rapid implementation
- Built-in 24/7/365 internet access by web or mobile device

### They also have downsides, including:

- Rigidity that can limit their effectiveness
- Fewer personalization and customization options
- Possible lack of integration with other productivity applications
- Privacy and security issues
- Forced upgrades
- Difficulty retrieving stored data

Many companies are turning to a new breed of CRM – one that allows them to choose cloud-based on-demand and on-premise deployment options or a hybrid scenario based on their business profile. These new CRMs even allow companies to migrate from one to the other if their needs change.

## What CRM Can Do continued...

This new solution offers flexibility and control not found in traditional software as a service (SaaS) offerings, including:

- Customization
- Integration
- Data ownership
- Upgrade control
- Security capabilities

This eBook offers an inside look at how a flexible CRM solution can benefit businesses striving to differentiate themselves in today's fast-paced sales environment.

But first, an anecdote:

The CEO of a large business coaching and marketing services firm, when asked which CRM system she used, replied that her company is a CRM 'burn victim' – she got burned for \$500,000 for a failed CRM implementation.

### **Further investigation revealed that:**

- Only three people made the selection – the now-former CEO, the CFO, and the president. There was no involvement from the managers, sales team, or daily CRM users.
- The implementation firm wasn't involved in the selling process and didn't understand the expected outcomes.
- They offered no training – users were expected to read manuals and learn in a 'sink or swim' fashion.
- There was no customization. The software provider offered their own operational processes and assumed that was all the company needed.

This story is sad because the woman's company lost \$500,000 from the software and implementation, yes, but even more so because of the productivity and opportunities she lost. To avoid getting burned by a bad CRM decision, take the content in this eBook to heart. Absorb it! Apply liberally if you've been burned before. Times are changing; software is getting better. There are caring and helpful implementation CRM advisors to guide your way to a positive experience with desired outcomes.



## Your CRM Must Satisfy Your Operational Requirements

In theory, CRM is a simple concept: it's all about organizing and analyzing the information you need to build stronger, more profitable customer relationships. It's harder than it sounds in practice, however, as you gather this information from more sources than ever – and you need to deploy it for the benefit of different users at different times and places.

A good CRM solution should satisfy at least the following operational requirements:

- **Greater reach across departments and better data visibility.** An effective CRM solution gathers relevant information from a wide range of sources, such as multiple departments in an organization and from across multiple partner and customer channels. A typical example: the field service representatives who handle a company's repair and support calls come in close contact with customers and have a unique understanding of their needs. As such, field service staff should have access to a CRM so they can record and share everything they observe during a call – including potential new business opportunities. In turn, the CRM solution arms them with the information they need to anticipate the customer's needs.



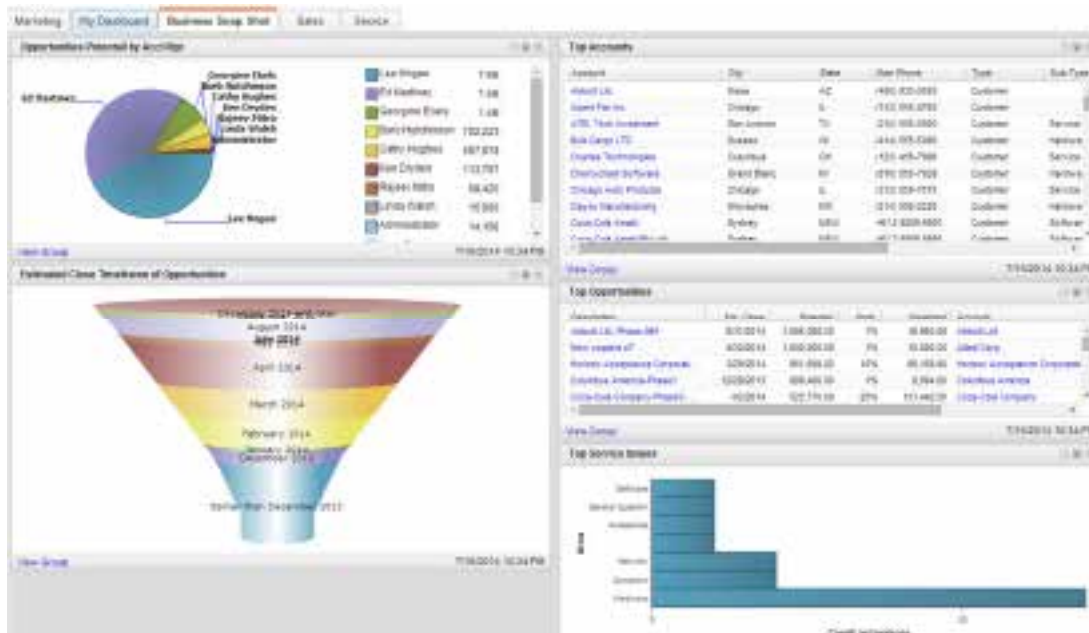
- **Easy addition of users and lines of business.** Sales may be the first link in the CRM chain, but it's not the only link. A company's marketing, customer service, support, accounting, manufacturing, and executive management teams can contribute to – and benefit from – a CRM solution that offers a 360-degree view of each customer. The key is finding a solution that will grow with you, supporting new users, processes, and roles that reach far beyond the sales organization.

- **New functionality.** An effective CRM solution ensures that the right users in a business have access to the features and information that suit their needs. Both a sales team and a support organization can benefit from CRM, but each group requires a different view of the customer.

# Your CRM Must Satisfy Your Operational Requirements

To enable an effective cross-functional approach to CRM, a decision-maker should look for a solution that provides functionality in three essential areas:

- **Business intelligence tools.** Today's best-in-class CRM solutions offer integrated and comprehensive reporting, business intelligence, and analytics capabilities.



- **E-marketing tools.** As more companies discover the benefits of e-marketing and marketing automation, they're seeking CRMs that offer these capabilities as native functionality or via seamless integration with a best-of-breed integrated web service.
- **Business process automation.** One of the greatest benefits of CRM is its ability to standardize and automate processes across an organization. Effective workflow tools facilitate automation, standardization, and collaboration at every step of customer lifecycle processes.
- **Collecting data.** Behavioral data is the lifeblood of CRM, and it offers every bit of customer knowledge you need, including contact information, buying trends/habits, feedback from sales representatives and customer service calls, and even social media accounts, which are nearly as important as phone numbers these days.

Your CRM is made to make your business customer-centric, and some companies will need to address these operational requirements today while others can address them over time, as they grow. Either way, a successful CRM solution will scale effectively, enabling new lines of business and functionality when and where it's necessary – either on-premise or on-demand.

## Your CRM Solution Must Enable a Dynamic Workforce

Today's workforce is mobile. Whether employees travel, work in the field, or work from home, they need reliable, 24/7 access to the same CRM information and productivity tools their office-based colleagues use. Unfortunately, many SaaS CRM vendors believe that "mobility" means offering access through a web browser. For the millennial worker, used to living in an app-based environment, this won't cut it.

Any CRM tool designed to serve a dynamic workforce must satisfy four requirements:

- **An appropriate user experience across various devices.** Remote workers rarely access data in their CRM system using a single device. Instead, they switch between PCs, laptops, tablets, and smart phones. A successful CRM solution will offer a familiar and situationally relevant user experience across all platforms and devices, allowing workers to focus on customers rather than struggle with user interfaces and feature sets. The CRM should also offer contemporary device support and a native user experience consistent with how workers use other applications on a device.
- **User configurable interface for purposeful work.** The engaged CRM user, especially with mobile devices, needs a simple method to display only the data they need for the task at hand. They should be able to hide unused menu options and configure the group view of account, contacts, opportunities, service tickets, and other information. The ability to capture voice notes and save as text to the contact record is a valuable benefit.
- **Reliable security.** Mobile devices are more likely to get lost or stolen than desktop PCs, and because data breaches can permanently damage a company's reputation and cause serious legal consequences, it's essential that a CRM solution protect sensitive customer data with encryption, remote management, and remote-disable features.
- **Online and offline access.** Mobile connectivity has a way of disappearing at the worst possible times. Workers require anywhere access and need to be productive whether they have network connectivity or not. An effective mobile CRM solves this problem with the ability to download, cache, and synchronize data for offline use.



Whatever the choice – on-premise or on-demand – the solution should give remote workers the same features, security, and productivity benefits available to on-site workers. It's essential to keep today's dynamic workforce engaged and productive, no matter where or when they work, and that means providing them with a CRM solution that's up to the task.

## Your CRM Solution Must Keep Your Company's Data Secure

Security may be the biggest issue for companies considering an SaaS-based CRM solution; studies show that 84% percent of CIOs see security as a major hurdle to cloud computing. Effective security isn't just about protecting business data against hackers – it's about finding a CRM solution that's reliable, meets your risk-management and IT governance goals, and offers the right amount of control over organizational data and business processes. Above all, CRM security is protecting one of your most valuable assets – your customer data. When deciding between an on-premise or on-demand CRM solution, the answers to the following four questions will make the decision clear:

- **Do we have control of our data?** Backups are your first – and perhaps last – line of defense against catastrophic data loss. On-premise solutions offer a high level of assurance regarding the consistency of backups, although they still depend on your company's internal IT staff. Be sure to evaluate on-demand offerings for their backup and disaster recovery services and procedures. Concerning data ownership, traditional on-demand CRM solutions rarely provide customers' private data in a usable format, raising the question of who really owns the data on the provider's systems – what will happen if you end the relationship with that provider and demand access to your data?



- **Can the CRM solution protect sensitive customer data?** CRMs frequently manage sensitive customer information, including credit card and other financial data. They often also integrate with other back-office systems like ERPs and financial applications, which handle sensitive data. The best CRMs provide the necessary security to allow employees to securely access such data when necessary.

- **Do we know where our CRM data is stored?** Many SaaS solutions employ multi-tenant architectures that raise privacy, security, or regulatory concerns for a business. Certain countries and industries have requirements regarding where data is kept, and SaaS providers may fail to address the question of where data is stored.

- **Do we have control over internal access to customer data?** A less sophisticated CRM that gives every employee the same access to data and functionality creates security and privacy concerns. A robust CRM solution allows a company to filter access to sensitive data based on user-defined parameters.

After considering those questions, a company may choose to manage data security risk by using an on-premise CRM solution. Or it may turn to an on-demand CRM option built on an advanced architecture with built-in benefits to managing and controlling data security. Either way, it's essential to keep control over – and ownership of – vital customer data.



## Users Must Adopt the CRM Solution You Choose

A surprisingly high number of CRM projects fail to meet companies' expectations; in a 2007 study, 44% of companies said their CRM efforts delivered only "acceptable" results, while 22% described their efforts as a disappointment.

Experts believe that user adoption/usability – or lack thereof – is what separates CRM successes from CRM failures. The best solutions are user-friendly, offering the right feature set for the right users at the right time and place to meet their needs.

Whether you choose an on-premise or on-demand CRM solution, the following questions can help you address usability requirements:

- **How robust is the core functionality?** Successful CRMs have a rich, highly functional set of core features that accommodate how your business operates.

- **Does the CRM solution empower users?**

A CRM should offer features that support and optimize users' daily activities, no matter which department they work in.

- **Is the solution architected for usability?**

True usability includes the ability to obtain necessary information with fewer clicks, drag-and-drop support, and support for standard mouse and keyboard behaviors – all things that have a major effect on users' comfort and productivity.

- **Can the solution integrate with familiar office applications?** A CRM should work seamlessly with standard business productivity tools like Microsoft Office or Gmail, allowing users to work with minimal disruptions.

- **Can the solution adapt to a range of user requirements?** A CRM should support custom screens, data fields, menus, and other elements; customization is essential for any CRM tool designed to work with different user groups, business units, and organizational needs.

A simplified, user-friendly CRM will reward users who take advantage of it by making their jobs easier and their days more productive.



## Users Must Adopt the CRM Solution You Choose

### Improve User Adoption by Utilizing the Right People the Right Ways

To avoid being part of the 22% of companies that were disappointed by their CRMs, take steps to prevent an implementation from becoming overwhelming.

First, know the proper mix of people, processes, and technology:

- **People** are responsible for 60% of CRM success
- **Processes** are responsible for 30% of CRM success
- **Technology** is responsible for (a surprisingly low) 10% of CRM success

To correctly utilize people as you implement a CRM solution, you must:

- **Get executive buy-in.** It's critical to get buy-in from the stakeholders; success won't happen unless they realize the value of CRM, understand how it's going to solve problems, and believe it's worth time, energy, and money to implement.
- **Consider everyone.** Understand what everyone stands to gain or lose. The question everyone is asking is "What's in it for me?" Actively involve end users in the solution design by soliciting – and acting on – their input.
- **Communicate, communicate, communicate.** Keep people informed of goals and progress to prevent them from feeling frustrated and disengaged. Listen to input and adjust as necessary. Communicate the "quick wins" to fuel enthusiasm.
- **Don't skimp on training.** CRMs aren't self-executing – people make them work, and adequately training them in the CRM process will smooth the transition and make sure it "sticks." Train during the implementation to make user transition easier, and later invest in reinforcement training to solidify the role of CRM in your business.
- **Choose a "Champion of Change."** Having a manager and a department committed to making the implementation work with a can-do attitude can lead the way for the entire organization.
- **Use an expert CRM consultant.** CRM consultants live and breathe CRM and can answer questions and solve problems, whether it's customization, functionality, or deployment strategy that's bogging you down.



# Users Must Adopt the CRM Solution You Choose

## Choosing the Right Partner for Your CRM Journey

Your CRM consultant should have:

- **A good sense of direction.** The right consultant is a human GPS for your business. Start by agreeing on the destination and expected travel time and let your navigator prevent you from veering off course.
- **Experience.** A good consultant is a wilderness guide who knows where the rapids are and which month you really need insect repellent. They know what the common CRM pitfalls are and can help you avoid them.
- **Likeability.** You'll spend a lot of time together, so choose someone you enjoy working with – no matter how good they are at their job, the implementation will be miserable if you can't stand their personality.
- **Patience.** You may discover something new that will speed up your implementation, but more likely you'll hit road blocks and detours. Your consultant needs to go with the flow.
- **People skills.** A consultant can be indispensable for keeping your team happy, so find one who's good at communication. (Good communication involves both listening and talking, by the way, so find a consultant who can do both.)



## Your CRM Solution Must Offer the Flexibility You Need

Flexibility is a very individual concept for vendors and end-user companies. End users must consider their organization's needs when defining 'flexible.' An organization in a growth stage, for example, requires a CRM with the flexibility to grow with the company. For a company with unique user requirements, a CRM should be flexible enough to offer the necessary customization options.

Ideally, you want to take the broadest possible view of what 'flexibility' means to you and then base your CRM decision on that. In addition, consider the following three areas, as they are essential to the long-term success of a CRM initiative.

- **Financial flexibility.** Pricing and licensing models that worked for a company at one point won't work as well at another point. A small, rapidly growing company, for example, may initially prefer a subscription-based, on-demand CRM model but later decide that a perpetual license, on-premise model makes better financial sense. As a company's financial situation changes over time, so should its options for licensing a vendor's CRM solution.

- **IT Flexibility.** Unexpected changes can strain a company's IT infrastructure, wreak havoc with budget forecasts, and interfere with other projects. Businesses lacking the infrastructure or staff to support an on-premise solution or companies dealing with new offices, remote workers, or other growth might start with an on-demand CRM. Here again, however, it's essential that the vendor offers both solutions, allowing organizations to move between the two or adopt a hybrid model as necessary.

- **Application flexibility.** Whether deployed on-premise or on-demand, a CRM should integrate with existing applications and data sources, including back-office applications, business intelligence and analytics tools, and desktop productivity tools like Microsoft Office and Gmail. Flexibility also means companies can continue to use their external data analysis tools.

- **Personalization/customization.** The CRM should support a variety of configurable and customization options, including custom screens, forms, workflows, menus, toolbars, and scripts as well as integrate with new applications, such as the social media tools that play an increasingly important part in customer relationships.



## Do Your Best to Future-proof Your Decision

Your CRM system, when implemented correctly and adopted by your staff, will quickly become a mission-critical tool in your business. To ensure its continued success, take the following steps.

If you're evaluating SaaS solutions, understand the vendors' plans for new versions and updates. Understand how they plan and communicate infrastructure upgrades to their SaaS platform and how software updates and technology changes may increase the complexity of your deployment.

It can be hard to function through a tightly-bound integration where changes to an SaaS platform's API break the integration, and SaaS providers may not always provide adequate test systems and resources during major upgrade cycles.

As you evaluate a vendor approach, you may have to decide whether to build the customizations required to support strategic policies or workflows that will break an SaaS provider's automatic upgrade experience and require manual conversion. This could mean not doing a key customization and limiting your options to a 'just good enough' solution.

These concerns make the process of choosing a CRM provider especially difficult for companies that demand predictability and long-term reliability. When it comes to adopting CRM in an on-demand situation, it's the established application with years of experience addressing use cases that can make the difference.

With SaaS, it's more than just being on-demand and web-based, it's about the vendor being able to provide a complete understanding of your use case and providing a solution with enough depth to maximize productivity and the value of the customer relationship management investment.



## Putting It All Together

People, processes, and programs work together to create a customer relationship management system that supports growth and profitability and provides the right mix of flexibility and usability to meet your business's needs. The right software successfully supports your business processes to increase their effectiveness, and effective business processes make the most of your talented people to enhance customer satisfaction and loyalty.

Implementing a CRM will net you more than improved sales and marketing productivity, increased effectiveness, and better customer service, too – analyzing Nucleus ROI case studies on CRM, the average ROI from CRM is \$8.71 for every dollar you invested.



### Conclusion

Recent trends suggest that many companies understand the value of CRM as both an on-demand and on-premise solution. The key is finding a CRM solution partner who understands both deployment options and offers businesses the flexibility to move easily between the two or to adopt both at the same time. The CRM business partners most likely to accomplish this without sacrificing functionality, flexibility, or security are those who can leverage their deep experience in the on-premise CRM market to provide the same functionality in a mature, single-tenant or multi-tenant, on-demand solution.

Business improvement must be continuous to stay competitive, so remember: CRM is a journey, not a destination.

### About Success with CRM Consulting, Inc.

Success with CRM helps privately held small-medium sized businesses tailor, implement and support growth-oriented CRM systems that enable their business to more consistently attract, keep and develop ideal-type, profitable customers.





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