



Secrets of CRM Success:

Beyond Technology: Maximizing Results with People and Process

Dave Whiteside, MBA

Director, Client Growth & Success

- 25+ Years in Professional Services Business Development
 - Focus on CRM Success and Client service
 - Background Marketing Technology Consulting & Sales

- CLIENTSFirst Consulting:
 - Team of more than 100 professionals
 - CRM Success Consultants, Strategists & Trainers
 - Outsourced Data Quality Professionals

Last Month – “Marketing Automation”



“Marketing Stack”

This Month! CRM!

Today's Objectives:

- To solve all your CRM problems (aspirational!)
- To understand WHY CRM is so hard and discuss some of the most common CRM challenges and ways to plan for and overcome them
- To give you a couple of success tips you can actually take home and implement
- Achieve CRM Success!



Why CRM?

CRM Leverages the Value of Relationships

Relationships are the #1 Asset of the Firm, and, the Currency a Professional Services Business Trades In

However

Rarely are they harvested, catalogued, maintained and leveraged in a centralized, usable, searchable and sortable format that turns Tribal Knowledge into Institutional Knowledge and enables Business Development & Marketing Activity.



Solution:

**We need ways to harvest, catalog, protect
and leverage information that we value**

What's Great About CRM?

A Typical CRM Can Do a Thousand Things!

- A sales tool
- A marketing tool
- A communication tool
- An information delivery tool
- An information sharing tool
- A customer service tool
- An automation tool
- An interactive tool



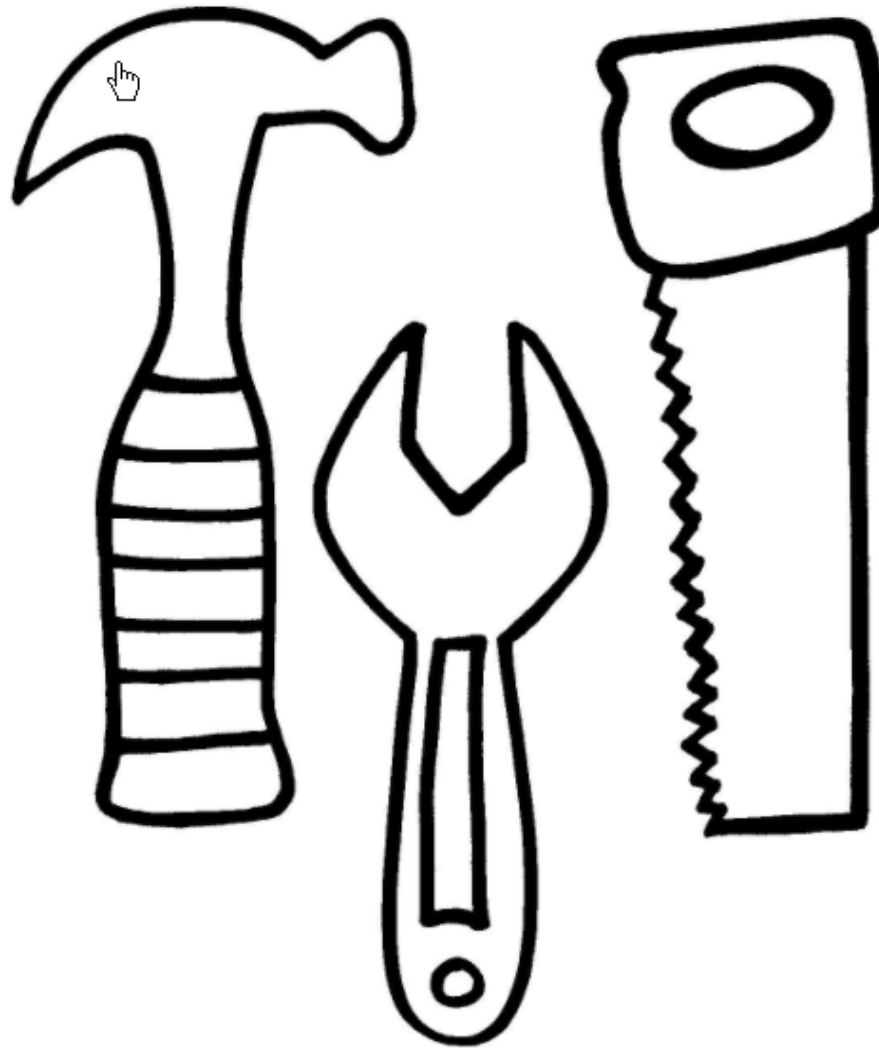
What's **BAD** About CRM?

A Typical CRM Can Do a Thousand Things!

- A sales tool
- A marketing tool
- A communication tool
- An information delivery tool
- An information sharing tool
- A customer service tool
- An automation tool
- An interactive tool



But Which Three?



What To Look for in a “Tool”

- Simplicity – (Complexity Kills Adoption)
- Customizable – (No two use it the same way)
- Cloud based (future is here)
- Outlook integration – (Synch / Data Quality issues)
- Integration with MS Office applications (Outlook tool bar ideal)
- Practice management system integration (Ideal as you advance)

Code Word

- Success

CRM Success is a People & Process Problem....Disguised as a Technology Problem

- The problem isn't the technology
- CRM success is all about

Adoption



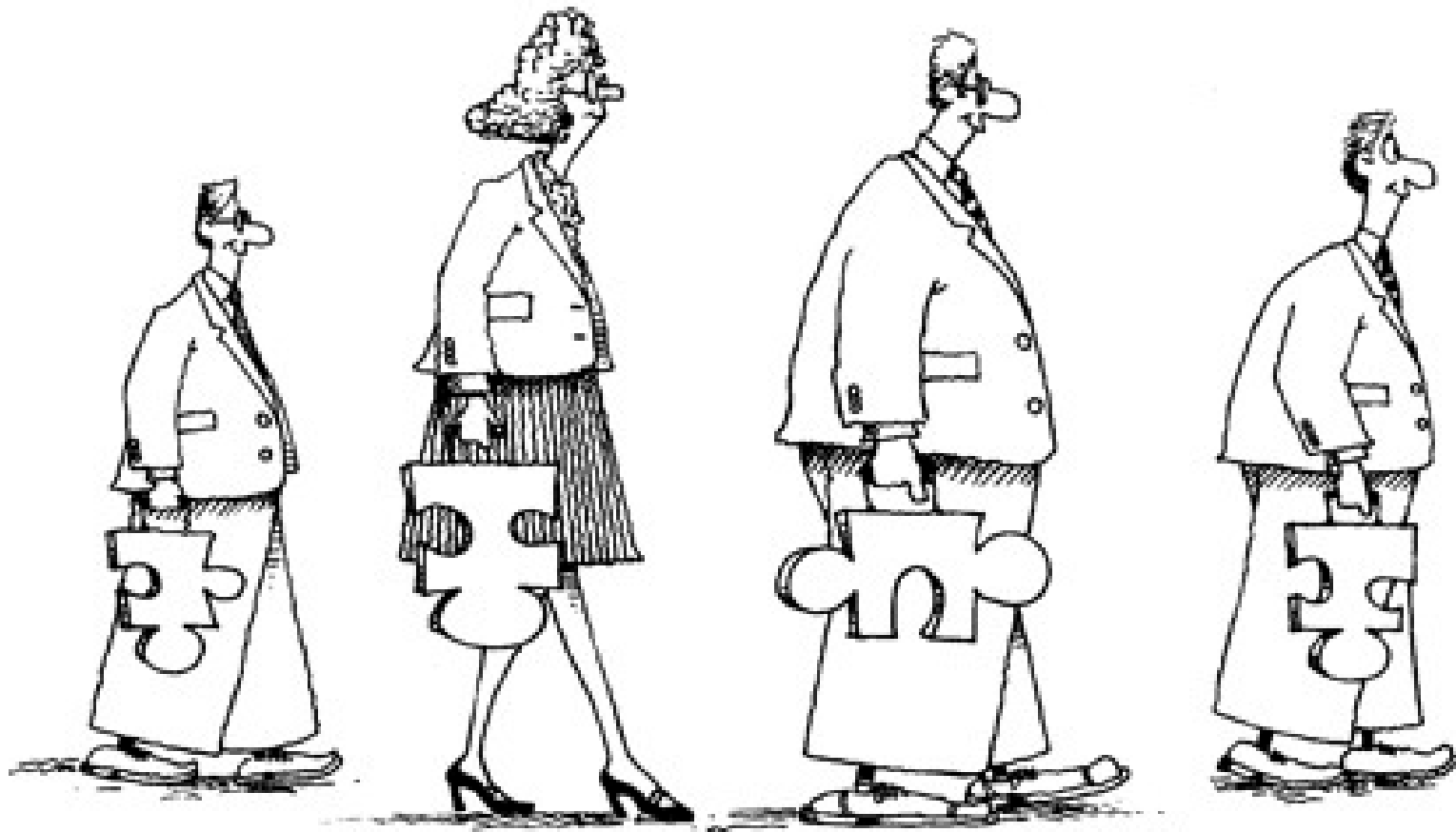
I'm
Looking
to Adopt
a CRM

Adoption

Big 3 Challenges

Problem # 1

TRIBAL KNOWLEDGE



Old Habits Hinder Adoption

Everything will work perfectly....until you add in the people

- Lack of adoption / buy-in
- Underutilization
- Lack of leadership support
- Lack of education
- Poor training
- No accountability
- Data entry
- Turnover
- Inadequate data resources
- “People want the system to read their minds”
- “People don’t want to do things for themselves
- “Whiny “professionals”
- “Our director won’t use the system”
- Won’t tolerate imperfection

Problem #2 - Bad Data Kills Adoption

"Bad data is the number 1 cause of CRM failure"

Most enterprises don't fathom the magnitude of the impact that data quality problems can have

30%

Data in CRM Outdated in 12 months

Gartner®

More than 75% percent of enterprises engaged in CRM initiatives cannot combine a comprehensive view of a customer with actionable, personalized advice

CRM programs fail, in large part, because the poor quality of underlying data is not recognized or addressed



Data Quality Challenges

- Data quality is often neglected
 - Data quality is essential to encourage system use
- Data quality essentials
 - Dedicated resources
 - There is no substitute for experienced, trained people
 - Consistent data quality standards
 - Consistent attention



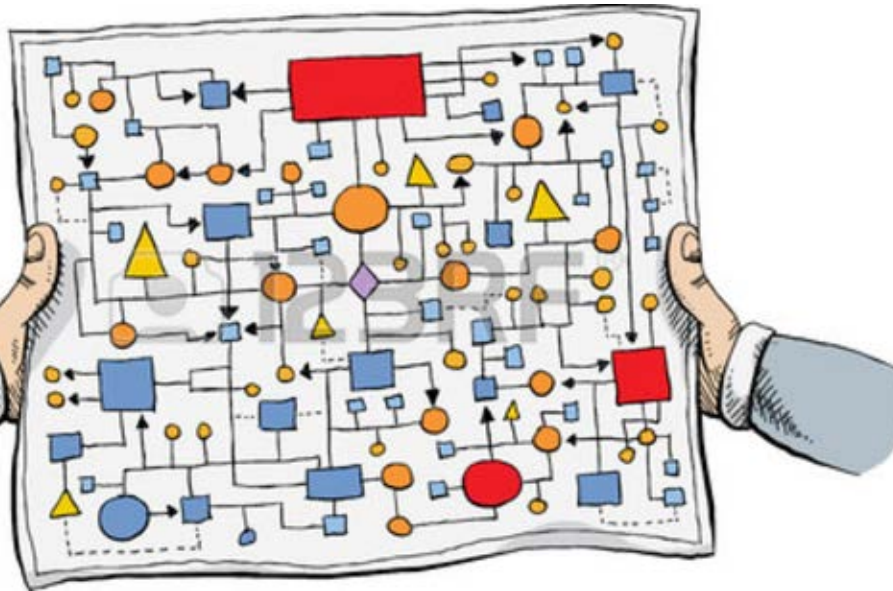
Problem #3

Over-Engineering Kills adoption





- 



Code Word

- Expectations

Expectation Setting

What CRM Is Not

- A project
- An initiative
- Easy



Expectations Challenges

What CRM Is Not

- A project
- An initiative
- Easy



Expectation Setting for CRM Success

Philosophy: Crawl – Walk – Run

- Crawl...get the basics down – show wins – build confidence in team, stakeholders and project
 - Functions – pick 2 or 3 achievable items (who do we know, email list management, event planning, pipeline)
 - Pilot Groups - by office / practice (small/manageable - easy wins)
 - Accept the fact everyone may not want to play
 - Before you “Walk” – “Crawl” should be viewed as a success – if not “Walk” will be doomed.
- Walk...focus on high value additions that are requested
 - Functions – what is Crawl for one may be Walk to the next (Pipeline)
 - Pilot Groups or full rollout – bite of the next group
- Run....Full rollout, advanced functions and integrations
 - Time to go firm wide?

Expectations - Resource Challenges

■ Time

- ☐ Set reasonable expectations
- ☐ Be honest

■ Money

- ☐ Set reasonable expectations
- ☐ Be honest

■ People

- ☐ Work with the coalition of the willing



Expectations - Data Quality Challenges

- Data quality is essential
 - To encourage system use
- Data quality is often neglected
- Data quality essentials
 - Consistent data quality standards
 - Dedicated resources
 - Establish resource plan
- The magic bullet...
 - There is no substitute for experienced, trained people



Expectations - Process Challenges

- No formalized procedures
- Lack of consistency / standardization
- Capturing the right data
- Data entry
- Bad data
- Lack of integration
- Manual systems
- Spreadsheets
- “Worst” practices
- “We imported a bunch of sh**”



Fighting...We have always done it this way...

Code Word

- Adoption

The Good News: Success Is Possible



Keys to CRM Success

- Strategy
- Planning
- Communication
- Resources
- Training
- Data quality



Strategy – Why?

- Why do we need a CRM?
 - ☐ Centralized Repository?
 - ☐ Improve Client Communication?
 - ☐ Retention?
 - ☐ Growth?
 - ☐ Pipeline Visibility?
 - ☐ Foster Sharing?



Strategy – How?

- Assess specific needs - Organizational
 - ☐ Group / department
 - ☐ Individual
 - ☐ Customer / audience
 - Define goals
 - ☐ Limited in number
 - ☐ Measurable, achievable
 - ☐ Agreed upon by key stakeholders
- ❖ **Once here – Time to select a product**
- Configure the system to meet needs
 - Measure against goals



Planning – Nail These 5

- Rollout
- Communication
- Training
- Data quality
- Integration



Planning Questions

- How will participation be encouraged
- How will people be held accountable
- How will information be communicated
- What data do we really care about
- Who will enter the information
- What can be automated
- How will contacts be categorized
- Do we need 'rules of engagement'
- How will the data be cleaned
- How will ongoing training be handled



Solving the People Problems

- Gain management buy-in and support
- Set realistic expectations – create opportunity for a win
- Involve end users early and often
- Focus on training
- Target specific groups
- Appoint champions
- Assess needs
- Solve problems
- Save time
- Communicate effectively
- Train regularly

The Real 'P'

We often win the CRM battle
one 'P' at a time



Communication – Best Practices

- Include vision / mission statement
- Convey management support
- Focus on benefits to the organization, groups, users and key audiences
- Enhance with incentives and contests – “Gamification”
- Plan for ongoing messaging
- Survey users
- Implement suggestions
- Update on progress
- Communicate successes
- Repeat

Rollout Realities

- Plan
 - ☐ Accept the fact not everyone will participate
 - ☐ Let them go
 - ☐ Work with the willing
- Rollout in manageable pieces – office or groups
- Pace – some are faster learners and adopters than others - don't be afraid to segment them. Make fast learners mentors and champions.

Training

- Focus on end user business processes
- Plan
 - ☐ New users
 - ☐ Ongoing training (Crawl – Walk – Run)
- Break into manageable sections
- Support with user friendly materials
 - ☐ Quick reference
 - ☐ Online
 - ☐ Video

Code Word

- Food

The REAL Key to CRM Success

FOOD!!!



Final Thoughts

- CRM is a marathon, not a sprint
 - Don't try to boil the ocean
 - Small victories, communicate successes, repeat
 - Be patient
- It's never too late to focus on success
- Don't do it alone
 - Reach out for help
- Subscribe to CRMSuccess



Q & A



Dave Whiteside, MBA

CLIENTSFirst Consulting

E: DW@ClientsFirstConsulting.com

P: [904-612-4617](tel:904-612-4617)

W: www.ClientsFirstConsulting.com

B: www.crmsuccess.net