

# Successful CRM:

Practical ideas to help improve your CRM





# 1

## Appoint your own project manager

In addition to the Project Manager appointed by your software vendor, you will need to appoint your own dedicated Project Manager. This person must have a clear understanding of the current policies and procedures and it is hugely beneficial if they have decision-making authority as so much time can be wasted if every decision is made by committee.

# 2

## See standard software before you scope

We all know the importance of a comprehensive scope to the delivery of a successful CRM project, but even the most detailed plan can be derailed by a lack of understanding from employees. CPiO often demonstrates standard CRM software to its clients before embarking on the scoping exercise. This ensures that everyone understands what is possible 'out of the box' and can see potential opportunities for 'standard' software application, thereby reducing the amount of changes and bespoke development required further down the line.

# 3

## Phased implementation

Sometimes the only way to truly know what you want from a CRM system is to use it in a live environment. By creating a phased implementation plan users gather hands-on experience of how the system works, shortcuts and best practice. This is important when considering workflows, dashboards and reporting requirements.

# 4

## Train, train, train

Poor training is the number one reason CRM implementations fail in the UK. Low user confidence will always lead to poor adoption and eventually, total apathy in CRM. Our message is clear – don't scrimp on training. Our train the trainer approach ensures your organisation is left with super users that should support the roll out of training to all staff. However, if that rollout falters or gets postponed, users can quickly get frustrated and momentum and excitement is lost. Plan your training schedule to give every user role-specific training in good time BEFORE go live.

# 5

## Produce an end user manual

This is your opportunity to deliver your best practice training to your staff. Whilst system training is designed to demonstrate how software works, end user procedural training is tailored to the specific requirements of your business and tackles company policy and consistency of data entry. A CRM system is only as good as the data that it is placed in.

# 6

## User acceptance

Testing of your system should be planned into diaries in advance of go live. Every user should have the opportunity to thoroughly test the new solution to identify any issues or anomalies with data. We also suggest a user-specific checklist to focus the user on what is required in order to perform their job function. Issues and queries should be logged centrally.

