CRM

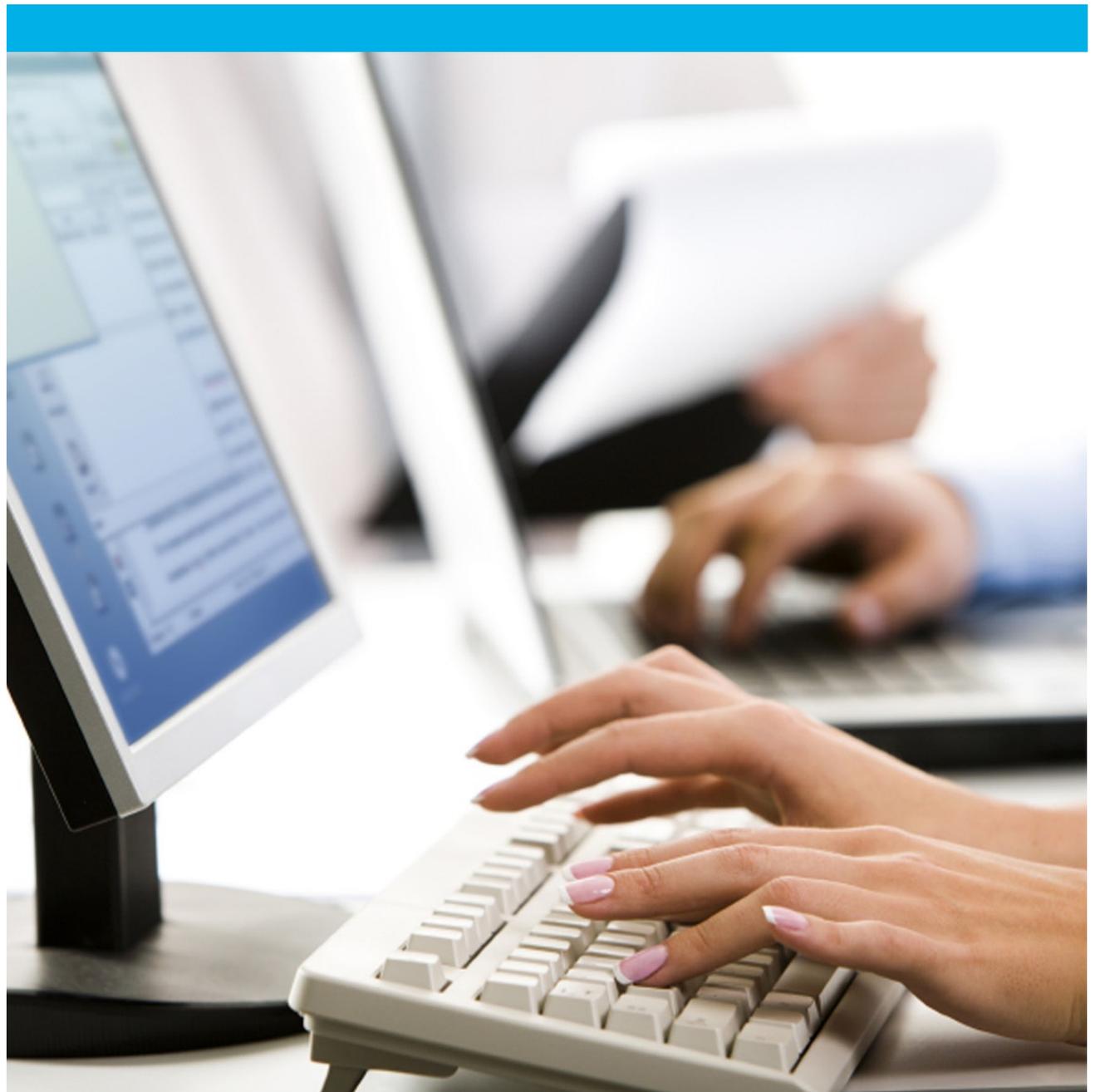## The Golden Rules

Nobody has all the answers when it comes to the perfect customer strategy. But there are some basic principles that could help you along the right track. Here we share the experiences of both Sage and CPiO to provide you with useful information that we think might just make the difference between CRM success and CRM failure.

1

CRM isn't just technology, it's a way of life

Sounds dramatic? Well it is. Good CRM isn't about the technology you choose but how willing you are to commit to becoming a customer-centric organisation. As the customer is your revenue generator, by placing them at the heart of everything you do, you are already opening up opportunities to increase and manage your revenue better.

CPiO recommends that at the outset of your project you define your current business processes, the customer touch points within your organisation, the people and departments involved and the problems you feel need to be resolved. We can help with this, because until we understand what drives customer relationships in your organisation we can't suggest improvements or map technology against it.

2

Who is the customer?

The word customer can be interpreted in so many ways. Perhaps we ought to call it stakeholder? With companies becoming more diverse with multiple locations, multiple suppliers, partners, shareholders, who are you really looking to support effectively? If the answer is all of the above then CRM is key.

A good CRM system will take into account all of your relationships – both internal and external.
Staff feel more motivated because they suddenly feel informed, supplier relationships become stronger, customers get greater levels of proactive service. And prospects – well you hit them at the right time and with the right product. Does it get any better?

3

Every CRM solution is different

If you listened to every CRM solution vendor they would tell you that you need all the bells and whistles. That bigger is better. That functionality is key. Erm no, actually. CRM is about what you do with the technology not how complex it is. And it differs from company to company. What works for one organisation won't work for another.

CRM has to be flexible and has to reflect your company objectives – that's why defining a strategy is so key. CPiO has many different software applications covering a broad spectrum of needs, complexities etc, but we'd rather match the right software to your needs, not the other way around.

4

Planning pays

In our humble opinion you can't plan too much for a CRM project. Good planning will involve a discussion with all of the stakeholders to define what they are looking for. Good background information gathering will arm you with project justifications, cost analysis and a good ROI argument. By doing this upfront you'll be able to get on with actually choosing the right system much quicker.

Remember that any person who requires information made available to them should be considered a system user, whether that person be internal staff, an external partner or customer.

5

Think global, act local

Most CRM technology vendors will tell you that CRM is not a single department solution. We agree. But that you have to go big and launch CRM right across the business in one go? Revolution not evolution? We don't agree.

True it is proven that the most successful CRM projects are ones that get the full buy-in of the entire organisation. But that doesn't mean you have to implement CRM in one go.

Our experience with customers shows that our most successful sites are those that thought global and implemented local. What do we mean? Well they got buy-in from the very top, but they started in one or two departments and rolled it out gently, to ensure that users felt comfortable and that there were no knee-jerk reactions. As long as you have a project plan, you'll get the entire organisation using CRM before you know it.

6
Work with an experienced partner in the right sector

Many large CRM vendors have chosen to move into the mid-market sector to take advantage of lower penetration rates. Is that a good enough reason to hand over your cash to them? We don't think so. We think you are better off sticking with a partner experienced in your type and size of company.

CPiO understands this market place. All of our customers sit in this space. We believe in keeping things as simple as they can be and not getting carried away with mind-boggling jargon. Ask your chosen vendor to give you reference sites that have some similarity to yours? It may not always be about the industry but more about the process.

7
Back office integration is key to rapid Return on Investment

One of the areas that many companies overlook when evaluating CRM solutions is the fact that accounts payable and accounts receivable data can form an integral part of CRM. Sales history, linked with credit history could prove invaluable to a member of staff deciding whether or not to give a discount to that customer on the phone.

Choose a system and a partner who understands your back office too – that way you'll get the processes spot on. Choose a technology that offers seamless integration as standard. The cost benefits of this approach are so great that some companies report an immediate ROI.

8

Implement relevant technology

When you choose a CRM system, make sure it's based on current technology. Don't let a sales person talk you into futures. Demand to see a current version of the software as it is deployed today. You have a right to buy what is available today with an understanding of where it is going tomorrow.

Equally important, don't buy old technology. CRM software has come on so much in recent years and technology is always moving forward. Don't accept something that has a limited shelf life – understand your own replacement cycle and ensure that the software will grow with you.

9

Implementation methodology is as important as product choice

Always have a blueprint of how you want your CRM strategy to be implemented before you start implementing it! All the planning and strategising in the world won't make a difference if you start your roll out to the wrong team or at the wrong time.

Share your plan with the stakeholders in your business so that they understand how it will affect them before the changes take place. You'll never get it accepted if you roll something out without warning. Perhaps you are hitting a particularly busy time of the week in one department or there are staff shortages in another which may prevent staff from being able to commit to training. Remember internal staff are customers too.

10

Test and train

Testing the software is crucial. Because once it goes live and your CRM strategy is launched some stakeholders can be very unforgiving if technology and processes fail. As part of testing ensure that all back office integration is also working from day one. Make a list of typical operations that each department may undertake and follow the process through to completion.

But most importantly don't scrimp on training. Good training tailored to the individual's job type and skill level is essential. CPiO always stresses the importance of this and with our 'train the trainer' policy we empower you to manage your people – after all you know them best.