# CRM IMPLEMENTATION
# 7 STEPS TO SUCCESS

Seven steps to follow on your path to a successful CRM implementation

## GUIDE HIGHLIGHTS

- Creating a comprehensive change management plan
- Deciding whether to hire a CRM consultant
- Cleaning and migrating your customer data

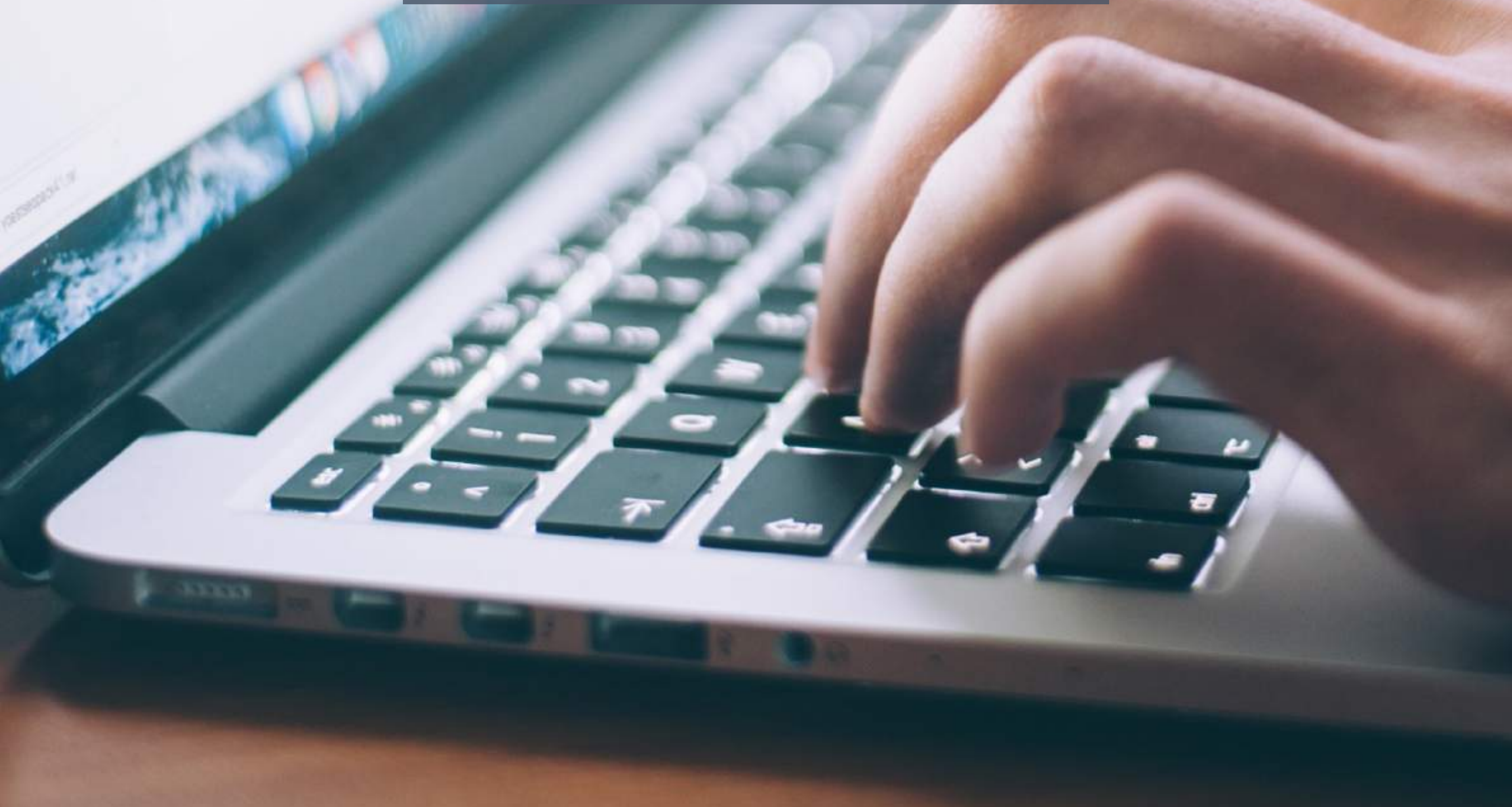
# INDEX

# A CLEAR STRATEGY

Technology-driven businesses can really thrive with the help of CRM solutions, so it's no wonder Gartner forecasts that CRM will be a **$36 billion market** in 2017.

It's a common misconception, however, that CRM implementation involves simply purchasing software, installing it, and moving on.

If you want your CRM solution to work, and work well, you need to have a clear implementation strategy. Here are seven steps to follow for CRM implementation success.



# 1. BUILD AN IMPLEMENTATION TEAM

After selecting your new CRM, the first thing you need to do is get a strong team together to develop your implementation plan. It is essential that this team is well-balanced and includes representatives from all key stakeholder groups - you otherwise risk poor user uptake and a diminished return on your investment

Your team should include:

## REPRESENTATIVES FROM SENIOR MANAGEMENT

Even if your top management doesn't need the CRM software for their daily tasks, they should be involved in the planning and implementation process, to help ensure the results of the investment meet expectations.

## END-USERS

Figure out who in your organization will be using the CRM system. You need to include representatives from every area/department to ensure complete implementation success. Planning to satisfy all potential end-users is essential because the CRM system will only be effective if everyone uses it.

Key user groups include your on-the-ground reps and marketing execs as well as department managers. Don't make the mistake of taking the head of sales' needs as representative of the entire departments' - include frontline staff in your team as well as those higher up.

## YOUR PROJECT MANAGER

One person should be responsible for the implementation process overall. They're in charge of planning the meetings, organizing the team, and making sure key implementation goals are met.

This doesn't necessarily have to be someone from management, but someone with the skills, knowledge, and enthusiasm to take on the role. The IT department is a good place to start - whilst they may have never implemented a CRM before, they will more than likely have taken part in other software implementation projects and understand

### YOUR CRM "CHAMPION "

An important member of your team will be someone who is really interested in the new CRM system. The CRM's champion is someone who wants to learn everything about the system. Users can refer to them when they have problems or questions. This role isn't the same as the project manager. A sponsor/champion (or super-user) of the product can be a contact point with the vendor and help explain important features to the rest of the team.

*"The CRM's champion is someone who wants to learn everything about the system. Users can refer to them when they have problems or questions."*

Once you've built a complete team, you can start developing an implementation approach. Begin by determining which other internal software/systems the CRM solution needs to interact with, such as human resources systems and ERP.

You should discuss any required integration or customization with your CRM vendor. Providers often offer customization services as part of a wider implementation support package, and they will know the ins and outs of their software better than anyone. Consider them the final element in your implementation team.

# 2. CREATE A CHANGE MANAGEMENT PLAN

Implementing a CRM system can have a huge impact on how your business functions, including the day-to-day jobs of individual employees.

Facilitating this change with a well-constructed change management plan is essential - according to the U.S. Department of Labor, staff **productivity decreases up to 75% during unmanaged change**.

Start off by surveying your organization to see how prepared they are for change. Surveys can help you identify departments or individuals who might be resistant to change and why. This will help you develop your change management strategy.

Here are some procedures you should follow as part of your change management strategy to ensure a smooth transition:

## COMMUNICATION

Create a program to inform all affected parties about the CRM system, including its benefits and the implementation process to come. This can be done through a series of general meetings, announcements, or newsletters, but it's a lot of information to process, so try to get creative.

You can develop an email campaign to inform employees about the benefits of CRM for the whole company, not just sales. The benefits can be vast and include better customer service, satisfaction and retention; better sales, market intelligence and lower costs.

*"Your CRM solution will affect the workday of many people You can expect some resistance to change."*

Your CRM solution will affect the workday of many people You can expect some resistance to change. CRM is designed to streamline business tasks, and some employees might fear their job is in jeopardy as a result of the change. Others will simply dislike the new standard for business processes.

Set up an approach to respond to these complaints. Focus on the benefits of CRM for them - for example, streamlining administrative tasks allows more time to close sales. Address the concerns of these individuals one-on-one, enlisting the help of peers and supervisors.

## INCENTIVES

Showing people the potential benefits of a CRM system for them isn't enough to get them enthusiastic about using it. Implementing some kind of incentive with a measurable benefit is an effective method to fix this.

You can 'gamify' your CRM implementation with a reward points program or something similar. For example, an employee or team could earn points based on their CRM login rate, or their completion of key e-learning modules. You can then offer rewards for your organization's top earners - this could be anything from a free lunch or department night out to an extra day's P.T.O depending on the resources you have at hand.

## INTERNAL GUIDELINES

Communication and incentives will help ensure most of your organization is enthusiastic and accepting of change. These are the first and most important approaches to take, but in the end, management should still draw out some clear guidelines for who they expect to use the system and how. Include CRM usage as part of your job descriptions and performance evaluations to encourage adoption.

# 3. DECIDE WHETHER TO HIRE A CRM CONSULTANT

Hiring a software consultant can do a lot to simplify the CRM implementation process, but they don't come cheap. For a 10 user team wanting full implementation and training services from their consultant, costs can run up to $10,500.

Luckily, not every organization needs the help of a software consultant to implement a CRM solution. It's also worth asking your vendor about their options for implementation support - many vendors offer consulting services included in the price of software. Others may charge extra for implementation support, though this is unlikely to come to as much as an independent consultant.

*"For a 10 user team wanting full implementation and training services from their consultant, costs can run up to $10,500"*

It's important to know where you stand on this before you start to put your implementation plan into action, so you don't end up scrambling for one later on.

Here are some signs you might need the help of a consultant:

### YOU DON'T KNOW IF YOUR IMPLEMENTATION PLAN IS COMPREHENSIVE

If you have a plan to implement a CRM solution on your own, but are unsure if it addresses all of your organization's needs, you probably need a consultant.

### YOUR IN-HOUSE IT STAFF ARE TOO BUSY TO HANDLE THE JOB

Your organization may have great IT people, but if they're preoccupied with day-to-day tasks, a consultant is a must. Your in-house staff will still need to work with the consultant, but it wouldn't impact their workload as much.

### YOUR CUSTOMER DATABASES ARE KEPT IN DIFFERENT SILOS

Plenty of organizations still store data in different silos that don't communicate with each other. If yours is one of them, you have some complex restructuring to do when implementing CRM.

### YOU HAVE LITTLE KNOWLEDGE OF YOUR CUSTOMERS' ENGAGEMENT CHANNELS

If you can't retrieve basic information about your customer, and can't identify their engagement channels, then you need help with tactical practices as well as software implementation. A worthwhile software consultant will offer this as part of their service.

### 10 QUESTIONS TO HELP YOU CHOOSE THE RIGHT SOFTWARE CONSULTANT

If you think your organization could use the expertise of a software consultant, you need to make the most out of the investment. Make sure you thoroughly vet your potential consultant to make sure they're the best fit for your organization's needs.

- Here are some questions you should ask to see if they're a good fit:
- Have you worked with organizations our size before?
- Have you had experience implementing CRM in our industry?
- What implementation approach(es) do you recommend? Why?
- What issues do you think our organization is likely to face during implementation? How can you help mitigate them?
- How do you plan to train our IT staff to use the system?
- Have you ever dropped a client? Why?
- Has a client ever fired you? Why?
- What sets you apart from other CRM consultancies?

Even if the first consultant you interview has great answers to all the questions, take the time to meet with several others. This way, you're sure you find the right consultant for your needs.

## 4. CLEAN AND MIGRATE YOUR CUSTOMER DATA

Data migration for CRM is a lot more complicated than moving data from old fields to a new system. It's very unlikely that your current contact management system will match the new CRM fields, which can make data migration the biggest task of the entire CRM implementation process.

Here's what you need to do:

### CONSIDER DATA EXCLUSIONS

In some cases, it might not be worthwhile to migrate all of your contact records to the new system. This is a decision you should make first, so you and your team don't waste time on unnecessary data.

Here are a couple of examples of potential exclusions you could consider:

- If your current CRM system is 15 years old, how many years of activity should you migrate to the new system?
- Should you migrate contact records that have been inactive for 10 years?

### MAKE SURE YOUR CURRENT DATA IS CLEAN AND ACCURATE

Contact your account managers and ask them to clean up their current client contact information. **70% of CRM users say their system offers improved access to customer data**. But that won't be the case if your current data isn't accurate.

Take the time to fill in missing fields, ensure the information they already contain is accurate, and remove any duplicate data you find. Things to look out for include:

- Duplicate/outdated email addresses
- Contact information for those that have left client companies
- Incorrect/not updated job titles for current contacts

There's no point in transferring bad data to a new system, and cleaning up your data before migration will encourage users to keep it that way after.

### BACK UP THE OLD SYSTEM

You never know what problems you might face during data migration, and the last thing you want is to lose customer information in the process. Backup the data on your old system before taking any steps to migrate in case a big issue arises.

### REFORMAT DATA FOR THE NEW SOFTWARE

Get an idea of the different fields, labels and categories of the new CRM system, and start formatting your current data to meet those needs. Doing this before migration will decrease the chances that data ends up out of place after.

*"There's no point in transferring bad data to a new system"*

### ADD TO AND UPDATE THE NEW CRM SYSTEM

Once your data is formatted, you can start adding it to the new system. You will probably come across new labels and categories that fit your business. When you do, update your already-migrated data to use these fields as you go along. That way you make the most of the system's features from the beginning.

# 5. TEST YOUR NEW CRM EXTENSIVELY

Before your new system goes live, take the time to thoroughly test it. Problems at launch can affect overall adoption, so make sure everything works and your data is secure. Here are the system areas you should test:

## DATA QUALITY AND CONVERSION

Hopefully, you managed to take care of most of your data quality issues before and during migration, but you should still double check before launching the system:

- Is there duplicate data?
- Is your hidden data actually hidden?
- Is the data mapping correctly?
- Does new and updated data save correctly?
- Do partial and full search work?
- Is there missing data?
- Do graphs represent data correctly?

## FUNCTIONALITY

Next, you should test each functional aspect of the system, especially for point-of-sale (POS) transactions:

- Are your access permissions set correctly?
- Do transactions upload properly?
- Do department-specific transactions work properly?
- Do failed transactions process properly?
- Are users able to change the transaction type?
- Is there data mismatch? (e.g customers with the same name are accidentally merged)

## REPORTING AND INTEGRATION

Next, see how well the CRM solution passes data to or from external systems, including accuracy of these reports:

- Do CRM data and reports match existing records?
- Are reports exported in the right format?
- Does the AND/OR filter work properly?
- Are fields with no input value being overlooked?
- Do labels appear continuously?
- Does the right data appear when store filters are applied?
- Do reports show the right date and time?
- Do reports show the right heading and build versions?

## REGRESSION AND USER ACCEPTANCE TESTING

Once you've addressed all these potential issues, go through each section again and confirm. Then you'll be ready to start training end users in your organization and test the system in real-time with them.

- Does your CRM documentation meet all the needs of your end users?
- Are customizations you've made to the CRM system easy to use?
- Are all features implemented correctly?
- Is system data reliability available for end users?
- Are customer details kept confidential?

After addressing these user acceptance issues, you can ensure the application integrates well with other systems the end user needs.

And remember, any time you fix a defect in your system, run these tests again to see if other areas were affected.

# 6. TRAIN YOUR USERS

User training is probably the most important step to implement a CRM solution successfully.

CRM is growing quickly as an industry, but its actual benefits after rollout aren't keeping up. According to the National Computing Centre, **one in three companies say their CRM rollouts deliver only limited benefits**.

Why?

Industry research is revealing a big problem: customers aren't taking advantage of all the features CRM offers. Even if you manage to onboard your end users, you won't get much out of the system if they can't or won't use the features you predicted would deliver a good ROI.

## WHO NEEDS TRAINING?

In brief: anyone who will be using the system, and anyone who is supervising system users.

A common mistake is to skip management during the training process, but if they don't know how to use the system, they won't have the knowledge to efficiently supervise those who do use it.

And the more knowledge management has of the system, the better job they can do of promoting proper use after initial training.

## TRAINING METHODS

There are a lot of different ways you can train your staff. These include:

- A company-wide seminar
- Department-specific seminars
- Classroom-based training
- Online courses

It's best to use a combination of training methods to suit the needs of different teams. For example, online tutorials or e-learning modules would work well for your IT staff so they can learn on their own time. Your customer service team might find more benefit in a group seminar

### DOCUMENTATION

Your documentation is something that will be there to help with training, but it will also be a resource employees can refer to again and again. Having thorough documentation is really important, since unless your vendor offers top-up training or free training for new employees, new recruits will be using it for primary training.

*"unless your vendor offers top-up training or free training for new employees, new recruits will be using [documentation] for primary training"*

Take the time to create a quick reference guide, which includes:

- Step-by-step instructions of main procedures such as adding a new contact, opportunity or completed sale
- Illustrative pictures and screenshots
- A reference section for quick questions

And create a facilitator's guide that covers in-depth resources and advanced operations. This will make it easier to pass user-training onto someone else down the road.

### FOLLOW-UP TRAINING

If you want your new software to really improve your relationship with customers, then follow-up training is a must. A month or so after initial launch and training, have a refresher program to make sure your staff is getting the most out of the program. Enlist the help of your super-user to help people learn the most productive ways to do things. Follow-up training will also help deter bad habits from becoming permanent with the new system.

# 7. GO LIVE

You've migrated your customer data, tested your systems, and now you're ready for a CRM rollout. This is an important event because it will play a big role in determining the level of ROI you achieve on from the project.

Needless to say, you want your CRM rollout to be seamless and uneventful. Here we outline the steps you need to take to ensure this is the case.

## SCHEDULE ROLLOUT WITH SYSTEM ADMINISTRATORS

Just like with every stage of your CRM implementation process, make sure your rollout is planned and scheduled beforehand. Have a meeting with system administrators to discuss when and how users will complete training.

Select an exact day to bring users online and allow them to start using the system. Also, develop procedures to follow when auditing the system's performance post-launch.

## ALIGN TRAINING WITH GO-LIVE

Try your best to minimize the time between training and launch, so it's still fresh in users' minds. Some users need to be trained in advance to test the system, but you should also set up a dedicated training session right before the CRM rollout.

Make everyone who can help users train on the system is available during the launch. This includes your project team, executive sponsor, and IT personnel. The more questions they can answer for users during the launch, the smoother the rollout will be overall.

## REMIND USERS TO COMPLETE TRAINING GOALS

Most CRM systems make it easy for administrators to see when users log into the system and what training they've completed. Keep track of their system usage and progress. This will help you make sure they're using the system as planned. You can also send reminder emails out to any staff who are behind on training.

## AUDIT DATA INPUT

Now that the CRM rollout is underway, it's time to put your audit procedures into action. Monitor your data sources and integrations as sales and marketing staff start using the system's features. Generate and review reports to look for functionality problems to fix.

*"Successful CRM implementation and usage is a long term investment."*

Once you're through with your CRM audit procedures, develop a plan for long-term monitoring of system health.

## ACTION THESE POINTS BEYOND DAY ONE

**The average ROI for a CRM system has been estimated at $8.71 for every dollar spent**. Successful CRM implementation and usage is a long term investment. So go the extra mile by holding follow-up meetings and training sessions to encourage proper system use.

Holding regular follow-up meetings during the first few weeks makes it easy to clear up any potential questions users may have as they learn the system.

This guide was written by Courtney Danyel, Discover CRM Columnist, with contributions from Kathryn Beeson, Discover CRM Editor

For more exclusive CRM advice and resources follow Discover CRM on social media

This guide was brought to you by www.discovercrm.com