

The CRM Checkup

- *By Chris Fritsch, CRM and Client Success Consultant and Founder of CLIENTSFirst Consulting*

As with any stressful or strenuous activity, always be sure to visit your physician before beginning your CRM 'workout' regimen. For a CRM checkup, you'll probably want to enlist the services of a CRM 'specialist' such as a consultant who focuses on helping Clients to succeed with CRM.

So what does a CRM checkup typically involve? Relax - we promise we won't ask you to cough or say, 'ahhh.' Instead, if your firm has already rolled out a CRM system, but seems to be suffering from a bit of CRM malaise, the consultant may take your CRM temperature by asking you questions about where you are with your rollout, the challenges you've faced and successes you've had.

If you're thinking about selecting and implementing a new system, we'll examine your firm's unique goals and specific needs and the problems you think CRM could help to solve. We'll also check your CRM pulse to determine whether you have done the necessary work to get in shape including committing the time, money and other resources required, enlisting management and leadership buy-in and putting the necessary systems, processes and procedures in place.

Once we have run all the necessary diagnostic tests, we'll prescribe an assessment, which is a plan for success that includes a healthy dose of information, ideas and best practices to help you achieve long-term CRM health and prevent any recurrence or relapse of problematic CRM symptoms, issues or challenges. We'll also recommend a regimen for long-term CRM 'fitness' that includes short-term, intermediate and long-term goals and recommendations for long-term CRM success.

Before we leave, we'll even check your blood pressure - because CRM is not for the faint of heart. However, for those who are willing to commit, follow their specialist's orders, and take their prescriptions as directed, the payback can be well worth the effort.

Of course, as with a visit from any doctor, you will ultimately receive a bill. But after a CRM checkup, you'll find that the benefits more than outweigh the costs - and you won't even have to file an insurance claim. Afterwards, you'll find yourself feeling much better (at least about your chances for CRM success).

If you think you may be in need of a CRM Success checkup, feel free to call. We'll be happy to give a free consultation - and we even make house calls (subject, of course to travel expenses).

About the Author

As a CRM and Client Success consultant and the founder of ClientsFirst Consulting, Chris Fritsch helps Clients successfully select and implement the right technology solutions to support their business development efforts and maximize adoption and return on investment.