8 CRM implementation best practices

A poor-quality CRM implementation can significantly impact the bottom line. Here's what you should consider when choosing and rolling out a CRM system to ensure a faster return on your enterprise software investment.

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CIO |
JAN 31, 2018 1:49 PM PT

Customer relationship management (CRM) solutions continue to evolve, with established vendors releasing new features and functionality (cloud, mobile, AI) — and new vendors entering the market. As a result, whether you are looking for an enterprise solution or one tailored for small or midsize businesses, need a solution designed for a mobile, decentralized workforce, or want something industry-specific, there is a CRM for you.

But with such a wide (and evolving) range of CRM solutions to choose from, how do you determine which CRM suite is right for your organization? And, more importantly, how do you then get business users to make the most of the software?

To answer these questions, CIO.com queried CRM vendors, users and experts. Following are their eight suggestions for getting the most out of a customer relationship management system.

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1. Be clear about your pain points and goals

"While many customers say their goal is to leverage new technology, too many times their first set of requirements will be to reproduce what they currently have, e.g., they simply move from on premise to cloud or one cloud solution to another without [carefully examining] their objectives, processes, focus, etc.," says Jeff Lumsden, senior manager of CRM product management at Oracle Sales Cloud.

That's why, "it's essential to understand your organization's needs and goals before evaluating the options," says Christina R. Fritsch, president and client success consultant at CLIENTSFirst Consulting. "What drives your need for CRM? What do you hope to accomplish? What problems will it solve? What processes can be improved?"

Then "establish realistic goals," she advises. "For a new CRM, one goal might be to create a central repository of clean, complete contact data and reliable mailing and event lists. For an established CRM, where the aim is to enhance return on system investment, goals may be more sophisticated, like tracking sales activities or pipelines," she explains. "By identifying goals in advance, you will have established metrics for measuring progress."

2. Understand how users work

“The most successful CRM deployments are those that [take into account] all types of users, not just the top sales reps, or the top reps that enter data to the system today, or the most technologically savvy users,” says Lumsden. Instead, when choosing a solution, survey a cross-section of your CRM consumers — from sales, marketing, IT, customer service, and finance — and take their input seriously.

It’s important to “understand not only how your users work, but why they work that way and how they'd like to work in the future,” he says. The “look and feel [of the CRM will] play a factor in whether your users like [and use] the CRM system,” he notes.

By taking into account the needs and preferences of those who will be using the CRM, and choosing a solution with an interface that feels familiar or is comfortable, you stand a better chance of a smoother, swifter company-wide adoption.

3. Make sure you can customize, personalize and scale for the future

“When identifying which CRM platform can provide a tailored solution for your business … it’s critical to think long term and understand not only what is needed today, but what will scale and grow your business,” says Lynne Zaledonis, vice president of product marketing at Salesforce Sales Cloud.

“Think about 12 months after implementation,” says Matthew Tharp, chief evangelist at bpm’online, a provider of CRM software. Ask vendors: “What happens when you want to change the layout of the interface? What does it take to automate something new or change existing automation processes? You want to make sure your organization will be able to change at will, based on existing resources, rather than have to find and hire a consulting firm to make basic changes.”

One solution is to “opt for a future-ready platform that houses data, software and services in a secure cloud environment,” says Michael Ringman, CIO of TELUS International. “Besides freeing you from time-consuming and costly software installs on hundreds or thousands of computers and devices, a cloud-based CRM system can easily scale up with you as your business grows in size and expands geographically.”

Here, new features, in particular those based on artificial intelligence, are worth investigating, Ringman says.

“Also consider the new generation of CRM that includes built-in intelligence that can automate data entry and lead or service case routing, which will also free up time as well as resources to provide more personalized service,” he says. “These artificial intelligence-powered systems will also automatically generate insights to [help you] better understand your customers and predict how they will feel and act in a given scenario.”

4. Vet vendors and ask the tough questions

“Choosing the right vendor is as important as picking the ‘correct’ CRM,” argues Matt Bieber, CEO of CDC Software, a SaaS integration solution provider. Before you sign a contract, “make sure you have every detail available about a vendor, including their experience in the industry, responsiveness, clients, partnerships with significant tech companies, and maintenance and support levels.”

“Always ask during demos how much training and support you'll get,” recommends Patrick Delehanty, marketing manager at Marcel Digital, which specializes in website optimization. “Make sure that beyond training and support that they have a great help and resource section. Remember: Training goes beyond the end user of the CRM; it comes down to technical updates your team (like developers or IT) may have to make down the road.”

5. Get executive buy-in

"Executives are often the key to driving adoption among front-line employees," explains Mikey Heinz, CEO of Bright Planet Solar. "When adopting a CRM, get your entire executive team on board from the start, and ensure they can articulate to anyone in the organization why adoption of the new tool is essential."

6. Roll out in phases

"Rolling out a new solution is a balancing act between time, functionality and value," says Lumsden. "Take too long, and people lose interest, the project gets cancelled or systems get too complex." Do it too quickly, and you risk overwhelming users, or vital details or tasks falling through the cracks. Therefore, he's says, it's essential to plan your rollout in phases, making sure each user group is up to speed on the system before moving onto the next phase.

7. Provide proper training and support

"Because CRM involves change management, training is essential for users and requires a customized approach for groups and individuals," says Fritsch. "Marketing training should focus on things like contact segmentation, list building, event management and reporting. Data teams need training on research and data-quality best practices. Assistants need training on inputting and updating information and activities and adding contacts to lists. Sales teams need to learn tasks and tools to enhance their productivity and processes to improve their close rates. [And] managers need to learn to glean insights from relevant metrics and reports.

"It's also important not to forget that because CRM is not a project or an initiative, CRM never really 'ends,' which means training must be ongoing," she adds.

8. Automate processes

"Automate the heck out of your CRM processes," argues Tharp. "You want your sales and service reps focused on engaging customers, not remembering where to track down certain data or what to do next with each customer — the system can and should do that for them. The more the workflow can be automated and guide users to the next best action for each customer, the more users will not just adopt but love the CRM system," he says. "It's often the weakest part of the CRM implementation, but the most crucial."

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