

## 6 Ways to Get Better Results from Your CRM Investment

By Robert Poe | Aug. 7, 20

### Issue Summary

Your CRM efforts should not stop when your implementation is complete. You'll have to manage the technology — and far more so, the people — in order to wring out value from your CRM investment.

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### Analysis

One of the secrets to getting the most from CRM is to continually fine-tune the process. Here are six techniques for continually improving your CRM system and reaping the rewards of better performance.

**1. Find and plug the cracks.** Theoretically, a CRM system doesn't have any cracks. Phone messages are always acted on, leads are always followed up and promises to customers are always kept.

The real world is messier. A properly implemented CRM system will eliminate almost all of these problems, but they will still happen from time to time. When problems do pop up, your job is to find out why and to fix them.

In a well-run CRM system, a lot of management is management by exception. You look for the things that don't work the way they are supposed to and you find out why. Then you correct them.

**2. Sell CRM to your organization, and keep selling it.** You need to sell CRM to your organization at all levels, just as if you were selling a product to outside customers.

Don't assume the selling is complete once the installation is in place. It continues throughout the life of CRM. This is especially true of the sales force, which generates most of the data on which the entire CRM process depends.

Of course, you need a good product to make the continuing sale. That means a CRM installation which is aligned with corporate strategy, emphasizes the parts of the sell cycle (leads, up-sales, etc.) that are important to your organization, is designed to make things as easy as possible for the users and works the way you want the sales process to work.

**3. Continually encourage users.** CRM isn't so much a product as an ongoing process. It's important that your efforts don't stop when the system is declared live.

One way to encourage the use of the CRM system is to make sure it makes life easier for the people using it. For example, you want to make sure that contact phone numbers in your

accounts file are current and complete. One way to encourage this is to provide an auto-dial feature which will dial the client's number with the push of a button on the CRM screen. This saves time for the employee who doesn't have to drag the number out of an address book and enter it manually, and it makes sure the CRM system has the correct phone numbers.

**4. Advertise successes.** As part of selling CRM to your organization, don't be shy about reporting successes. Constantly be on the lookout for ways in which CRM has made life easier, made employees more productive and helped improve customer loyalty.

In advertising success, it's important that the "successes" be successes in the eyes of your audience. The sales force, for example, looks at success in terms of more and bigger sales. They're not particularly interested in better reports for managers.

**5. Force the change gently.** Selling CRM is needed, but don't expect it to do the entire job. Everyone must be guided gently, but firmly, to use the CRM system and to populate it with correct data.

Generally your employees will divide into three categories when it comes to CRM. There will be the early adopters, whom will charge in and start using the system as soon as it is available. The middle level, whom will ease into it gradually as they get comfortable with it, Then there's the rump, whom will have to be forced to use the system. Part of the way to make a successful change is to give the people in the middle a reasonable amount of time to get comfortable and then, gently but firmly, bring the rest of your people along.

In forcing the change, be sure the system is ready beforehand. Requiring employees to use a particular CRM feature before all the bugs are fixed is a sure way to build resistance to your system.

**6. Monitor your progress.** Finally, watch your results. CRM is rich in dashboards and reporting tools which will help you follow your progress by just about any metric you choose.

It's important that you choose metrics which are objective and directly relevant to your goals in implementing CRM. Avoid metrics that don't produce exact numbers, like percentage of products completed. Your goal is precision.

Likewise, make sure your metrics are relevant. If you want to know the number of miles driven per day by your sales reps, there is probably a way to get that information out of a good CRM system. But what's the point?

Don't use metrics that put an undue load on your sales force or other information sources. Concentrate on things that are easy to generate, easy to collect and which flow naturally from your business process. Ideally, the people generating the information for you should barely notice the information-collection process. That may not be an achievable goal, but don't waste their time by asking them to collect information just because it might be useful someday to someone.

## **Recommendations**

Don't ask for unnecessary information.

It seems odd that a successful CRM implementation — whose lifeblood is information — should

involve not gathering information. But keep in mind that all information is not created equal, or equally useful.

The downside to information is that in a lot of cases someone — usually the sales and marketing people — has to generate it. This takes time and takes resources away from their primary jobs, which are growing the company.

Before requesting a new report, consider what you'd do if you had the report in front of you. Would it really help you make better decisions? More specifically, can you think of a case in which having that information would have changed a decision? If you're honest, a lot of the time the answer is “no” and you don't really need the report.

If you decide you do need the report, the next question is: What is the most painless way to find what you need to know? CRM produces a web of information from many different sources. Many times, information can be derived from existing sources instead of having to be generated from original data. If you can get new information from what you already have, and find what you need to know, it saves burdening your people with additional data collection and reporting.

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