

Success With CRM

Critical Success Factors for CRM Implementations – From Lessons Learned

- CRM is a business strategy and requires your company to have the will and inclination to become customer-centric. This can be a long-term process of changing behavior.
 - An organization needs to make sure that its employees know what it means to deliver customer value.
- Establish Measurable Business Goals
 - Define the specific business benefits that CRM project is expected to deliver.
- Avoid automating chaos
 - Map out the current business process you are trying to fix before you invest in CRM.
- Align your business and your IT operations
 - While CRM is driven by technology, it's not about technology. The point of CRM is to improve your customer-facing business process; technology is only a means to an end
 - IT and business departments must work together
- Need to get Executive support up front- need a champion.
- Let business goals drive functionality
 - Will the feature help your company better serve customers, improve efficiency in business processes
- Use as much out-of-box functionality and then customize for additional needs
- Use trained, experienced CRM consultants
- Actively involve end users in the solution design
 - Solicit and act on end user input- WIIFT, "What's in it for them"?
- Invest in training to empower end users
 - Training should not merely focus on demonstrating how to use the software's features and functionality. Instead, training should teach employees how to effectively execute the business process enabled by the CRM system.
- Use a phased rollout schedule
 - Focus each phase on a specific CRM objective, which is designed to produce "quick win" – that is, meaningful results in a reasonable amount of time
- Measure, monitor and track
 - Once the system goes live, your company must measure, monitor and track the system's effectiveness, with an eye to continuously improving performance.
- CRM requires great customer information. People have to tackle the tough job of data quality, access and maintenance.