V. CRM

- CRM – *Customer relationship management*
- Upravljanje odnosov s strankami

1. Uvod

- Stranke predstavljajo „vir prihodkov“ za podjetje
- Skrb za stranko (*customer care*) je zato za podjetje zelo pomembna
- CRM je področje, ki je logično nadaljevalo vsebinske napore na področju skrbi za stranko
- Princip strahu

2. Zakaj CRM? Kaj so cilji CRM?

- Podjetju oziroma zaposlenim zagotoviti enoten in celovit pogled nad vsemi podatki o strankah
- Omogočiti pogled na vso komunikacijo stranke s podjetjem
- Podjetju omogočiti odkriti najboljše stranke
- Zagotoviti zvestobo (najboljših) strank

3. Komponente CRM

3.1. Upravljanje z računi in s stiki

- Zajem in sledenje vseh stikov (komunikacij) stranke s podjetjem
- Ena stranka ima lahko več računov (*account*)

3.2. Prodaja

- Prodajnemu osebju zagotavlja potrebna programska orodja in podatke za učinkovito prodajo produktov
- Zagotavlja hiter dostop do podatkov o strankah:
  - pretekli nakupi,
  - specifične zahteve,
  - potencialna področja zanimanja,
  - Itd.

3.3. Trženje in izpolnitev pričakovanj

- Omogoča pripravo in izvedbo oglaševalskih akcij ter analizo odzivov nanje
- Zagotavlja hiter odziv na zahteve strank, izpolnitev pričakovanj stranke

3.4. Podpora

- Podpornemu osebju zagotavlja programska orodja in podatke za učinkovito izvajanje podpornih aktivnosti
- Podpora je v kontekstu posamezne gospodarske branže

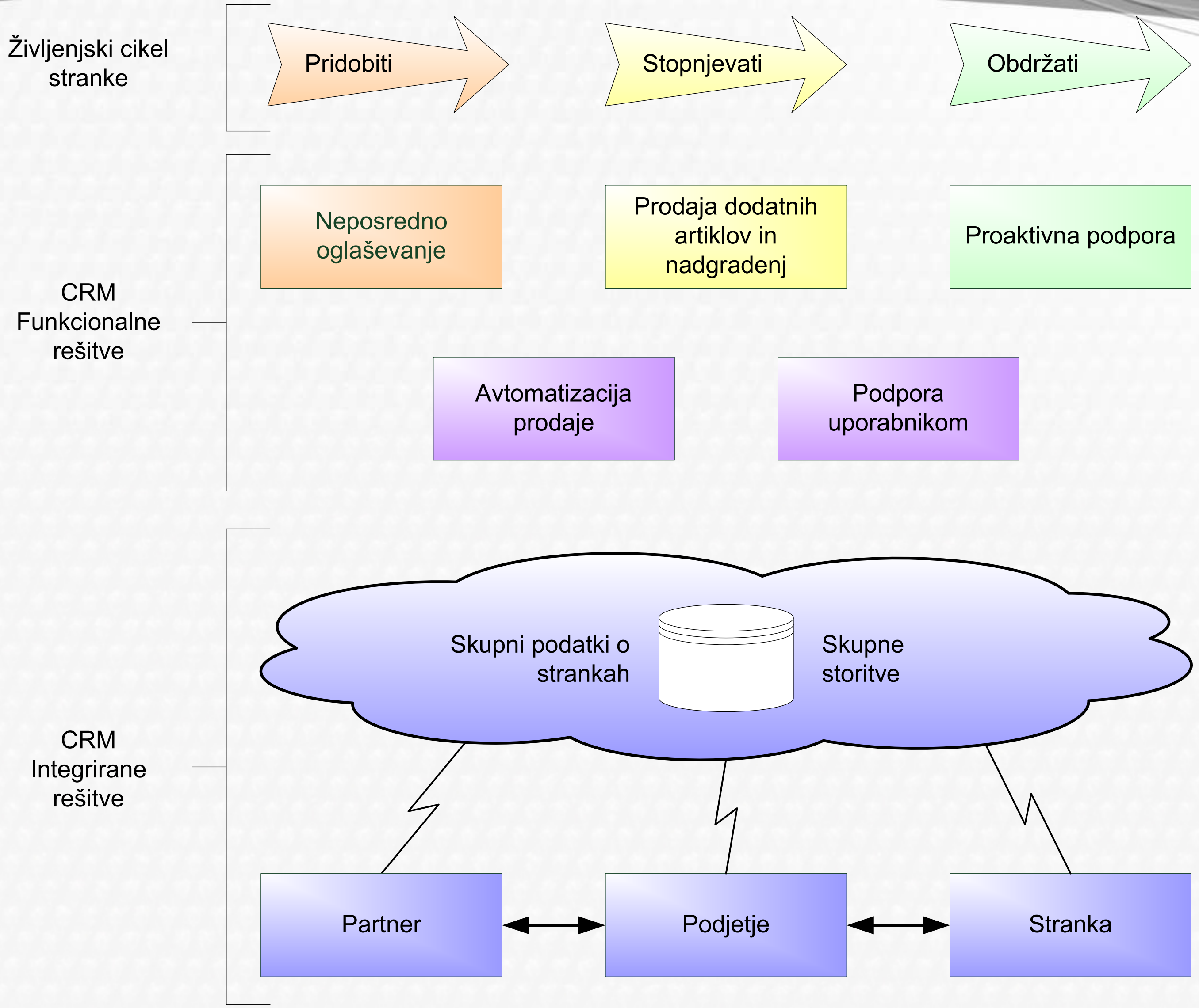
3.5. Zadržanje in zvestoba

- Omogoča identifikacijo in nagrajevanje najzvestejših in najbolj dobičkonosnih strank
- V razmislek:
  - Prodaja izdelka novi stranki stane šestkrat več kot prodaja istega izdelka obstoječi stranki,
  - Povprečna nezadovoljna stranka bo svojo neprijetno izkušnjo delila s približno osmimi do desetimi ljudmi,
  - Verjetnost prodaje novi stranki je 15%, verjetnost prodaje obstoječi stranki je 50%,
  - 70% strank bo znova poslovalo s podjetjem ob hitri razrešitvi garancijskega zahtevka.

4. Stopnjevanje odnosa med stranko in podjetjem

- Pridobiti:
  - Podjetje uporablja CRM za pridobivanje novih strank,
  - Cilj je, da stranke začnejo zaznavati izdelke podjetja in podjetje kot nadpovprečne,
  - Ključna so področja upravljanja stikov, prodaje, neposrednega oglaševanja in izpolnitve pričakovanj,
- Stopnjevati:
  - Podjetje uporablja CRM kot način za nadgrajevanje svojega odnosa s strankami,
  - Cilj je nuditi nadpovprečni storitvi podpore in prodaje,
  - Prodaja vključuje avtomatizacijo procesa prodaje in usmerjeno oglaševanje zlasti kot orodja za prodajo dodatnih artiklov in nadgradenj,

- Obdržati:
  - Podjetje uporablja CRM kot orodje, ki mu omogoča iskanje in nagrajevanje svojih najbolj zvestih in dobičkonosnih strank,
  - S stranko se oblikuje poseben odnos.


Življenjski cikel stranke
Pridobiti
Stopnjevati
Obdržati
CRM Funkcionalne rešitve
Neposredno oglaševanje
Prodaja dodatnih artiklov in nadgradenj
Proaktivna podpora
Avtomatizacija prodaje
Podpora uporabnikom
CRM Integrirane rešitve
Skupni podatki o strankah
Skupne storitve
Partner
Podjetje
Stranka

5. Prednosti, pasti in tveganja

- **Ključne prednosti vpeljave CRM:**
  - Omogoča identifikacijo najbolj dobičkonosnih strank
  - Omogoča prilagajanje in personalizacijo produktov in storitev skladno z zahtevami, željami in navadami strank
  - Stranki omogoča enako izkušnjo neodvisno od mesta oziroma načina dostopa (neposredno v prodajalni, prek spleta, telefona…)
- **CRM ne zagotavlja vedno uspeha:**
  - Preko 50% CRM projektov na izpolni začetnih pričakovanj
  - 20% implementacij CRM je škodovalo odnosu z obstoječimi dolgoletnimi strankami
  - Glavni razlogi za neuspeh so pomanjkljive priprave na vpeljavo CRM in pomanjkanje razumevanja problematike
  - Managerji se zanašajo, da bo že sam sistem CRM razrešil poslovne težave in pri tem pozabljajo, da je za uspešno vpeljavo CRM potrebna tudi ustrezna prenova oz. prilagoditev poslovnih procesov

6. Stopnje CRM

- Operativni CRM (*Operational CRM*)
  - Omogoča izvajanje aktivnosti prodaje
  - Podpora s strani različnih orodij za avtomatizaijo prodaje
- Sodelovalni CRM (*Collaborative CRM*)
  - Stranki olajša komunikacijo s podjetjem (telefon, faks, e-pošta, mobilne naprave)
  - Skrbi za konsistentno sinhronizacijo interakcije s stranko preko vseh kanalov
  - Omogoča, da stranke s podjetjem lažje poslujejo
  - Omogoča celovit pogled na stranko in vse podatke o stranki
  - Omogoča celovit pogled na vso komunikacijo stranke s podjetjem

- Analitični CRM (*Analytical CRM*)
  - Omogoča vpogled v podatke o pretekih odnosih s stranko, njenih željah in dobičkonosnosti. Podatke črpa iz podatkovnega skladišča in drugih podatkovnih baz.
  - Omogoča analizo in predvidevanje vrednot in obnašanja strank ter napovedovanje povpraševanja
  - Omogoča oblikovanje ponudb, ki so prilagojene potrebam stranke
- CRM podprt s spletnim portalom (*Portal-based CRM*)
  - Vsem uporabnikom omogoča dostop do orodij in informacij glede na njihove vloge (prodajalec, analitik, stranka, dobavitelj…) in zahteve
  - Vsem zaposlenim omogoči, da se hitreje odzivajo na zahteve strank
  - Omogoča neposredno uporabo in dostop do vseh notranjih in zunanjih podatkov o strankah


Operativni
• Stopnja CRM, ki jo organizacije tipično uvedejo najprej
Analitični
• Sledi vpeljava analitičnih orodij
Sodelovalni
• Naslednja stopnja je vključevanje poslovnih partnerjev in strank
Portal
• Dostop do vseh oblik CRM preko spleta

Ključni dejavniki uspeha vpeljave CRM

- Jasna opredelitev in široka podpora v stranko usmerjeni poslovni strategiji
- Jasno razumevanje zahtev naših strank
- Uvajanju CRM primerna organizacijska struktura in kultura
- CRM–ju primerna programska oprema
- Povezano delovanje različnih tržnih poti
- Zavedanje velikega pomena zaposlenih in njihove motiviranosti
- Podpora in sodelovanje vodstva organizacije
- Strokovni način uvajanja CRM programske opreme
- CRM se ne obravnava kot neprekinjen proces uvajanja sprememb

Zakaj CRM z vidika stranke?

- prilagojeni izdelki/storitve,
- izpolnjena pričakovanja,
- osebna obravnava.

Zakaj CRM z vidika podjetja?

- dvig uspešnosti in učinkovitosti poslovanja,
- sposobnost identificiranja donosnih strank,
- grajenje trdnega odnosa s strankami,
- postopna izgradnja baze znanja o strankah.

Tradicionalno trženje : CRM

	Tradicionalno trženje	CRM
Cilj	"Naredi prodajo"	"Ustvari lojalno stranko"
Fokus	Pridobivanje strank	Celotni življenjski cikel stranke
Obdobje	Kratek rok	Srednji in dolgi rok
KPI	Tržni delež, Dobickonosnost produkta, Zadovoljstvo stranke	Delež dobickonosnih strank, Delež celotne porabe teh strank
Poznavanje stranke	Navade posameznega segmenta strank, Obcasne tržne raziskave	Individualne navade, Modeliranje in napovedovanje obnašanja v realnem casu
Produkt	Samostojen produkt	Produkt – sistem za povecevanje dodane vrednosti
Cena	Generalno znižanje cen	Razlikovanje cen glede na strankino lojalnost
Poti	Tradicionalne poti, Prodajalci	Novi kanali, SFA
Komunikacija	Enosmerna, orientirana na blagovno znamko	Dvosmerna, vzajemna, Personificirana informacija

7. Kritični pogled na CRM

- CRM je doslej večinoma bil uvajan v smeri, da je podjetje stranki lahko ponujalo čim več produktov. Praviloma pa ni uspel zagotoviti, da bi se stranki ponujalo to, kar res želi/potrebuje
- CRM ne sme biti cilj, da se od stranke „izpuli“ čim več. Treba se je znati v prvi vrsti stranki prikupiti in dati vedeti, da razumemo njene potrebe (*heart and mind*)
  - Avtomatizacija prodaje/trženja
- Kar se deklarira za prednosti CRM so bolj prednosti za podjetje in ne vedno za stranko
  - Prehod iz CRM v CMR: Customer Management of Relationships
- Stranke ne marajo občutka, da se jih „lovi“ in „molze“

F. Diskusija: Uvajanje CRM na FRI

- Cilji CRM:
  - Podjetju oziroma zaposlenim zagotoviti enoten in celovit pogled nad vsemi podatki o strankah
  - Omogočiti pogled na vso komunikacijo stranke s podjetjem
  - Podjetju omogočiti odkriti najboljše stranke
  - Zagotoviti zvestobo (najboljših) strank
- Stopnje:
  - Pridobiti
  - Stopnjevati
  - Obdržati

9. Razlogi za neuspeh uvajanja CRM

- Nepripravljenost na organizacijske spremembe in spremembe poslovnih procesov (29%)
- Kultura in način vodenja podjetja ter politika podjetja v splošnem (22%)
- Nerazumevanje CRM (20%)
- Premajhen proračun (4%)
- Težave s programsko opremo – Neučinkovita orodja (2%)

9.1. Izzivi kulture v podjetjih in pripravljenosti na spremembe

- Glavni razlog neuspeha uvedbe CRM (CMR) je praviloma produktna usmerjenost
- Potreba po spremembi filozofije v usmerjenost stranki (CMR) je za prenekatera okolja „preveč“
- Politika v podjetju polarizira ljudi in skupine, večje zahteve po spremembah dajejo ljudem občutek, da bodo izgubili moč

9.2. Nerazumevanje CRM

- Primerni nerazumevanja:
  - CRM se razume kot razreševanje kratkoročnih problemov
  - CRM je le tehnologija
  - CRM je orodje za posredovanje posebnih ponudb
- Ni pravega razumevanja za vlogo stranke: kaj naj bi bile dejanske prednosti za stranko

9.3. Slabo planiranje

- Planiranje mora biti vedno podprto s podajanjem merljivih ciljev. Cilji so lahko finančni, organizacijski, …
- Primeri ciljev:
  - Povečanje prodaje
  - Znižanje stroškov prodaje
  - ….
- Slabo planiranje poveča verjetnost, da bodo fokusi usmerjeni v nepravilna področja

9.4. Pomanjkanje izkušenj

- Uvajanje zahtevnih orodij zahteva izkušene uporabnike, ki bodo znali izkoristiti zahtevna orodja
- Uvajanje CRM (CMR) zahteva tudi „oblikovanje novih izkušenj" preko usmerjenosti v potrebe strank
- Izobraževanju za uporabo orodij je potrebno posvetiti dovolj časa in denarja

9.5. Premajhen proračun

- Podcenjevanje različnih vrst stroškov:
  - Integracija z ostalimi sistemi
  - Spremembe v poslovnih procesih in posledično v drugih informacijskih rešitvah
- Nepripravljenost vodstev za povečanje proračuna med potekom projekta

9.6. Neučinkovita orodja

- Orodja (informacijske rešitve) so že dosegle visok nivo zrelosti in obsegajo širok nabor funkcionalnosti
- Lasten razvoj se praviloma izkaže kot napačna odločitev
- Orodje lahko „izpade“ neučinkovito:
  - če želimo informacijsko podpreti stare, ne prenovljene in nespremenjene poslovne procese
  - Če ga ne spoznamo dovolj in ga „ne znamo“ uporabljati/izkoristiti

9.7. Pomanjkanje podpore vodstva

- Brez podpore najvišjega vodstva bo vsako uvajanje CRM (CMR) neuspešno
- Razlogi za neuspeh uvajanja CRM nakazujejo, da je potrebna močna podpora vodstva
- Uvajanje CRM mora biti projekt, ki ima sponzorja in promotorja iz uprave podjetja

Platforma SalesForce.com za implementacijo CRM

- Video: https://www.youtube.com/watch?v=r6hxqg3PgRQ
- Videlo: https://www.youtube.com/watch?v=BMtv6sbmdLc

- Video: https://www.youtube.com/watch?v=ToHiNvBON5A

A. Programi zvestobe

- Začeli so jih uvajati letalske družbe
- Ideja: motivirati stranko, da produkt (izdelek ali storitev) nabavlja samo pri našem podjetju
- Glavna pravila programov zvestobe:
  - Učinkovito zbirati podatke o nakupih produktov posameznih strank
  - Ugotoviti, koliko je posamezna stranka „vredna“ za podjetje
  - Obravnavaj stranke glede na njeno „vrednost“
- ?Cena subvencioniranega telefona

B. Uspešna uvedba CRM – prvi pogled

- Gartner je na podlagi uspešnih uvedb CRM definiral osem področji, ki jih uvedba CRM mora pokriti/opredeliti:
  - *Vizija: kaj želi podjetje doseči. Na primer: želimo biti vodilno podjetje…*
  - *Jasna poslovna strategija*
  - Jasna opredelitev, kaj bo dodana vrednost (korist) strank od uvajanja CRM
  - Sodelovanje in vključitev celotnega podjetja v uvajanje CRM
  - Poslovni procesi: pripravljenost na prilagajanje
  - Ustreznost in kakovost podatkov: možnost celovitega in enotnega pogleda na stranko, možnost izvajanja različnih analiz
  - Tehnologije: informacijske rešitve, arhitektura, infrastruktura
  - Metrike: zagotoviti ustrezne metrike za uspeh uvajanja
- Vrstni red izraža pomembnost področja. Tehnologije so šele na predzadnjem mestu!

C. Uspešna uvedba CRM – drugi pogled

- Opredelitev preko procesov
- Procesi:
  - Opredelitev strategije:
    - kje trenutno smo in kaj želim z uvedbo CRM doseči?
    - Kakšne stranke želimo imeti za svoj program in kako jih segmentirati?
  - Določitev dodane vrednosti:
    - Kako povečati dodano vrednost strankam za uporabo naših produktov?
    - Kako maksimizirati „življenjsko vrednost“ (*lifetime value*) strank, ki jih želimo?
  - Integracija različnih kanalov:
    - Kaj so najboljši načini komuniciranja za obe strani? Kje „prodajati“?
    - Kaj bo za stranko največja uporabniška izkušnja?

- Upravljanje z informacijami:
  - Kako zasnovati strukturo podatkov o stranki?
  - Katere podatke o „obnašanju“ stranke beležiti?
  - Kako ugotoviti način razmišljanja stranke?
- Ugotavljanje učinkovitosti:
  - Kako ugotavljati učinkovitost in profitabilnost CRM procesov?
  - Kako stalno izboljševati vse kar je vezano na CRM?
- Primer SNCF

D. Dober primer

- Definirati „business case“ za CRM
- Opredelitev ciljev na podlagi vizije podjetja in poslovne strategije
- Opredelitev strank, ki jih podjetje želi
- Ugotovitev trenutnih izkušenj, ki jih imajo stranke s podjetjem (mnenje strank o podjetju)
- Določitev uporabniške izkušnje za segmente (želenih) strank
- Izdelava plana uvajanja in določitev kritičnih dejavnikov uspeha
- Opredelitev potrebnih sprememb v vodenju podjetja
- Analiza pomanjkljivosti trenutnega stanja in tehnologije ter planiranje procesov na podlagi tega (1 leto)
- Pilotno testiranje (pol leta)

E. Nekaj misli

- CRM ni reklamiranje. Ni enosmerni monolog. CRM mora biti dialog
- Glas stranke: „Ne se zanašati na informacije o meni, začnite me poslušati in upoštevajte informacije od mene!“
- Pomembno je delati prave stvari, in ne stvari na pravi način!

10.1 Koraki uvajanja CRM – Prvi pogled

- Kdaj govorimo o metodologiji?

Here are the 5 steps to a successful implementation:

1. Plan and prepare
2. Set up and customize
3. Deploy Salesforce CRM
4. Drive adoption
5. Continuously improve

Prvi korak: Plan and prepare

Step 1: Plan and Prepare

Your first step is to plan and prepare. In this step, you'll identify your company's vision, goals, and metrics as well as your resources, tools, and dependencies. Getting this step right is crucial, so you won't waste time or have to back track.

Organize your team

The size and scope of your rollout will determine how many resources you need. However, all project teams should include the following participants:

- **An executive sponsor –** The project's executive champion should participate and support the initiative from the beginning, through go-live and beyond.
- **One or more system administrators –** This person should be involved throughout the implementation and afterward. It's important that the administrator understand the business processes and requirements from managers and users. For information about how to plan administrator resources, see the Best Practice document "Achieving outstanding CRM administration."
- **A project manager –** This person leads the implementation and makes sure the project tasks and overall timeline are on track.
- **One or more power users –** These users help make sure your project will meet the needs of the end users, including management. We also recommend that you use power users as first-line support. To fill that role, consider training these users first and then providing more in-depth training.
- **One or more trainers –** Trainers need to identify relevant materials from salesforce.com or develop custom training materials (such as quick-reference guides). You'll need materials both for the initial implementation to on-board new users and once the application is live, for remediation or for new functionality

Understand your data

Whether you're moving from another CRM application or simply tracking customer information in applications such as Lotus Notes and spreadsheets, you'll already have existing data. Data always becomes a bottleneck if it's not reviewed and cleaned early in a project.

Most customers underestimate the effort it takes to clean up, map, and load data. Data shouldn't be loaded until your system is set up, including setting up your role hierarchy, sharing model, and sharing rules.

By taking the time to understand your data during the planning stage, you can help define critical questions such as "Are we tracking crucial data?" and "What else should we be tracking?" For more information about the importance of data quality, see the Best Practice "6 steps toward top data quality."

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Choose an implementation approach

The two most widely used approaches are the "waterfall" and "scrum" methodologies. Waterfall is the traditional, phased, sequential approach that may lead to a drawn-out implementation timeline. The scrum approach is to constantly build and deliver small units of functionality and revisit and refine them with each cycle.

Salesforce.com uses the more iterative scrum approach for its development. With our regular releases (spring, summer, winter) we deliver new enhancements as soon as we have a baseline of functionality and then build and refine the functionality based on user feedback and use cases. For example, our quoting module was first delivered as a pilot with limited functionality. We added additional functionality in the next release as a beta release. In the next release, we added even more features and made it generally

Decide which approach suites your business. Many enterprise customers start with the waterfall approach for the initial release and then start using a more agile approach, scheduling regular major (for example, quarterly) and minor (for example, monthly or bi-monthly) releases.

Build a project timeline

Once you've chosen an implementation approach and prioritized all requirements, you can build the project timeline. Every timeline needs to include the time required to design, build, and deploy. Prioritization of requirements is also key to ensure any "must-haves" are included in the first phase or rollout.

If you use a scrum approach, your timeline will consist of short iterations of the design, build, and deployment phases for a smaller set of requirements. With the waterfall approach, the design and build phase includes all requirements prioritized for the initial deployment. For both approaches, consider what tasks can be done in parallel, such as cleaning, mapping, and loading data.

For both approaches, consider each requirement and estimate the effort required to implement it. For example, determine whether you can meet the requirement with out-of-the-box functionality or business processes (low effort) or whether custom development or integration is required (high effort). Use that information to determine how long it will take to implement each requirement.

Note that your timeline may be driven by additional factors, such as when your current system may become unavailable or a new fiscal year. Such considerations are a big reason why it's important to understand your goals, objectives, and must-have requirements.

Drugi korak: Set up and customize

Step 2: Set up and customize Salesforce CRM

Once you define your requirements, understand your data, and choose an implementation method, you're ready to set up and customize Salesforce CRM. We recommend you keep the initial implementation simple and use the "click-not-code" built-in configuration tools, rather than using Force.com code (Apex) and the pages functionality of the Force.com platform. As you get experience with the application and feedback from your users, consider how to enhance the application with those tools.

Define early how to customize the application. For example, if you need multiple record types for an object and field-level security, identifying that need helps as you create new custom fields and associate them to the correct record type, page layout, and security level in the wizard.

Be careful not to over-configure. For example, one customer created many new fields on its contacts page, which meant users had to scroll—a lot. As a result, they didn't fill out many fields and the company had start over with designing that page.

Here's a suggested approach for setting up and customizing Salesforce CRM:

- **Define the security settings –** Include the organization wide-defaults, roles, and user profiles. Test those settings by logging in with different roles and profiles. Make sure each user type can see, create, and edit information as needed, that the fields are in the right order, and that critical fields are required. Another important step is mapping all the roles to the users who will be added to the system, to ensure all users are associated with the correct roles when you go live.
- **Customize the application –** Create custom fields, page layouts, custom objects, custom tabs, rules, and other application customizations based on the design for each requirement to meet the business needs.
- **Create your reports –** We recommend that you start with the standard reports and customize them as needed to show the information you defined in the planning stage. You can easily customize reports to include any custom fields you need.

Tretji korak: namesti in vzpostavi sistem

Step 3: Deploy Salesforce CRM

The timeline you defined in the planning stage should define the deployment phases and associated schedule. At the first stage, your task is to get your instance of Salesforce CRM "production ready" by creating and adding users, loading your data, and training users.

It's important to communicate early and often, so users know about coming changes. Communication should come from the executive sponsor and focus on both the benefits to the company and what's in it for the users. Build excitement and set expectations. As the deployment draws nearer, outline the deployment plan, including when users will be trained and how they'll be supported.

Add users

Before loading your production data, first load all users. You can load users manually, one at a time, or with the data loader functionality. We recommend you first load all users and data in a sandbox environment before loading the final set of data into your production environment. (Unlimited Edition includes sandboxes; for all other editions, you can purchase sandboxes for an additional fee. Please contact your account executive for more information.)

If you load users with the data loader, the password notification is not automatically sent out. That's good, because you don't want to send out passwords until users have been trained and you're ready for them to log in. If you add users manually, you can select whether the user is notified.

Import data

Because data is loaded at a specific time, the transition will be easier if the data load is as close to deployment as possible. Be sure you schedule enough time to map and test the data. Here's a summary of the steps involved in importing data:

1. Plan your data import
2. Prepare your data
3. Test the import
4. Execute the import
5. Validate your data

Note: If users are still entering data into an existing system after the initial data load but before the go-live or cutover, there may be a set up "delta" data set. You'll need to import or manually load that data and incorporate it into any training exercises.

Train end users

If you have a sandbox environment, you can train end users around the same time you load your data. Use a subset of data—or data developed specifically for training—and plan training with hands-on exercises as close as possible to the go-live date. The sooner users can begin to use the application, the better; that way they can get immediate help in response to any questions.

Once users are trained and using the app, make sure they understand the support process. Define a contact for answering questions. And don't forget about the power users. What if they can't see their data? Schedule regular support sessions for the first week or two; that's when you'll get the most questions. Also, post links to training, job aids, quick reference guides, and where to get help—for example, on your home page.

Četrti korak: spodbujaj uporabo

Step 4: Encourage adoption

Once you're up and running, it's critical to get your users on board. To do so, it's important that you support your users, measure adoption, and encourage adoption.

User adoption begins with executive sponsorship. For the initial deployment, the sponsor must communicate clear expectations as well as enthusiasm. Usually, a combination of "carrots" and "sticks" works well, such as a mandate that "If it's not in Salesforce CRM, it doesn't exist." Use exception reports and dashboards to track usage and then use that information to understand where you need encouragement or enforcement.

Measuring adoption is critical, both immediately after go-live and over time. Set up usage reports and use adoption dashboards to track progress right from the start. You'll find adoption dashboards on the AppExchange. Use these dashboards to track login activity and new records added by users—both are a good start in ensuring users are logging in and beginning to use the application.

Peti korak: obvladuj izdaje

Step 5: Manage releases

Once Salesforce CRM is live, a new cycle of planning begins for the next phase, as you make available new functionality to add value and respond to user requests. Release management should begin as soon as possible after the initial deployment. This approach will also let end users know that you're addressing their needs and requests. For more information, refer to the *Release Management Best Practices Guide*.

10.2 koraki uvajanja CRM – drugi pogled

1. Start with a picture

It seems so obvious, but it is so often overlooked. When we looked at remodeling our home, I collected pictures that helped me to develop an overall goal for the remodeling project: a house that we would be happy to retire in…easy to clean, functional, relaxing, energy efficient, etc. Figuring out your goals for your CRM are no different.

Start with **"What will a successful CRM implementation look like…how will your company be better?".**

Yes…yes…your salesmen will be more organized, but what do you really want? Sometimes it is hard for people to answer these questions, since they don't really know what CRM can do. You may consider using the services of an Consultant to give you an advantage…to help you understand all of the different functions that are available and how the hundreds (or perhaps thousands) of other companies they have worked with have used this popular product.

Some goals might be:

- Improved and more accurate **methods** of customer contact.
- **Consistent communications** with customers and prospects that result in higher conversion rates from prospects to customers and higher retention rates for existing customers.
- **Management tracking** of sales activities to be sure that opportunities are not falling through the cracks or to determine where deals are stalled.
- Combined, **shared database** so that if someone leaves the company, all the client information is not just in their heads (or in their own personal Rolodex).

2. Define your sales process...Map out how you do things

In an ideal business environment, everyone on staff knows how the owner of the business would like each salesperson to follow up with prospects and clients. Each sales person would use the same (or similar) process, with company approved marketing and sales letters. Unfortunately, we all get so busy running our businesses, that we many times forget to let those that work for us know our expectations for follow up.

So our next step encourages you to spend some time with your management team and key sales people to **map out the ideal processes for each area of your company**.

- What is the expected response to a sign-up from the web site?
- What is the follow-up strategy for proposals?
- What is the ideal way to keep in touch with your customers?
- How do you keep in touch with your inactive customers?

Once you have designed your sales process, it is easier to **ensure that your CRM is reinforcing that process.**

3. WIIFM

The number one reason listed for CRM failures is lack of use by the end users. In the first few steps, you were figuring out how the company would benefit from a CRM implementation. If you want others in your organization to use the database, figure out what's in it for them. Look for ways that it can make your staff's lives easier…so they are more likely to use it.

There are lots of ways to make things easier.

- Put your sales letters and emails into templates to make them easier to generate (and to ensure that company standards you decided on in step 2 are being followed).
- Make generating email responses a breeze.
- Do you require sales reports? Have the CRM automatically generate them.
- Are there forms to fill out? Have your CRM automate that function.
- Add the CRM to your tablet or SmartPhone (have some of the power of a notebook without lugging one around).

4. Add customizations before roll out

For parts of our remodeling project we worked with professionals who could help us better utilize our existing structure. They came up with some great suggestions (from years of experience) that we would never have thought of…but have made our home so much better.

Occasionally I have clients that just want to do training and then they will figure out what fields to add. Just like in construction, this is a sure-fire way to waste your money and your sales staff's time. Don't make people go back to fill in fields. (Measure twice and cut once per our carpenter.)

All CRM databases start with a pre-defined set of fields that include most of the address fields that you need, with a few additional for categorization. If you have done the work in the first 3 steps, then you will already know what fields and customizations need to be added to the database.

- New fields might include (Industry, E-mail preferences, Trivia, etc.)
- Add fields needed to fill out custom forms.
- Add any fields or custom activity types for sales activity reporting.
- Update the sales process to reflect your corporate standard.
- Standardize your drop-downs to match your industry and to make it easier for you staff to enter things in the database.
- Include workflow for standard follow-up procedures

The list can go on. This is another area where **a seasoned consultant can help you determine what customizations should be handled prior to the roll out of your CRM.** They can also keep you from falling into the next trap…

5. Don't add too many fields

6. Be sure your hardware exceeds minimum requirements

Nothing is worse than working with a software that is slow because it is running on an underpowered machine. I keep my CRM, the Internet, Outlook, and Word open at all times during the day. Then as I work on other projects, I might also have open Excel, PowerPoint, a graphics program, a screen shot program, or my html editor. As in my house remodeling example, when we added more appliances we needed to upgrade the electrical. Adding new software is no different.

Regardless of the programs that your staff uses, you need to **be sure that you are updating your PCs when you update your software.** Newer software is designed to take advantage of the newer processor speeds and RAM. If your system isn't upgraded, then the new software will bog an older system down.

I cannot stress enough that your staff needs to have tools that keep up with them. **Old computers with newer software can significantly slow down your staff's output.**

7. Have documented procedures

Ugh! Who wants to prepare documentation! Unfortunately what seems obvious to the designers of the database is not always obvious to others and you can't expect end-users to remember processes, keystrokes, or steps. You will **use the documentation to train the staff** (the next step). In addition, it helps with that problem of turnover and letting the new person know how your company uses the CRM.

8. Train your staff...but not just keystrokes

Some programs are so easy to use that sometimes training almost seems redundant. However, there are lots of tips and tricks that an experienced user can pass on to the staff to increase their productivity.

But training should be so much more than just about steps to complete a task. This is the perfect **time to discuss and implement the company philosophy** that you outlined in the first two steps. Show the end users how they can use the CRM to help them fulfill that philosophy. It's the perfect time to implement new policies.

9. Follow-up and train your staff again

When you are watching someone show you how to accomplish something in a new software, it seems so logical…until you get back to your desk…when you can't remember where to start (good documentation helps here). Then when you are working in the new product, you can think of so many things that didn't even cross your mind when the expert was in the room.

10. Give Awards

Everyone responds to positive reinforcement. You want user buy-in? Try rewarding their behavior. Awards can range from verbal recognition to small gifts or money. More important is **where** they are handed out.