Rolling Out a New CRM

Rolling out the red carpet for a CRM system might seem silly, but it’s actually an important first step to getting everyone on board and explaining the basic processes. Some people might not be comfortable asking many questions at the outset of a new project, so it’s in your best interest to walk them through vital functions so they can hit the ground running to get the most out of the system.

Follow these tips to ensure that you make the most of the initial period in which you start using a new CRM.

Have a 30 Day Deliverable

Make sure you know what you want to see at the end of 30 days. This is especially important if you are moving from another CRM system to a new one. Write down the reports you want to be able to see at the end of that first month, as this dramatically increases the chances of success. What are you hoping to be able to see at the end of the month, and how will that influence your company?

Have A Key System Admin

With one person at the helm for system administration, the rules and management are likely to be consistent, making it much easier to get everyone on board. The administrator is the individual responsible for collecting current data from managers and accounting in order to populate the whole new CRM system, so this needs to be someone who works well at coordinating teams of people.

Start With an Accounting Important

Arguably, your accounting department might have the best data to transfer into the CRM to begin with, so it’s a great place to start. You can figure out where to go from there once this data has all been transferred properly. Work through this process and figure out what problems erupt and how you can fix going forward.

Know the Integration “Cost”

You’re going to get the most bang for your buck by having a system administrator and inputting the time to help everyone get on board, but this can also be an investment as far as your time at the outset. Know that you might encounter some obstacles and have to invest more time than you originally planned on, but you can counter this by thinking about the long-term benefits of structuring the system in this way. The cost might be concerned at first, but it will pay off in spades over the course of the following weeks and months.

Weigh these costs with the benefits of using the new system, too. Make sure you set regular dates for running reports so that those struggling to master a new system can see how their hard work is paying off. This makes buy-in easier for people across the board.

Do you have questions about how to transition from one CRM system to another? Stay tuned to our blog to learn more about our system and top tips for users.