



TOP 10 TIPS:

Benefiting from Customer Relationship Management (CRM)

- 1 **Set goals.** Know what you're trying to accomplish before you develop a plan for your consumers.
- 2 **Evaluate CRM solutions.** Consider past CRM solution successes and consult with people in your industry to see if one is better than another.
- 3 **Keep your current applications in mind.** Determine if the CRM system you are considering will integrate with your accounting and e-mail applications.
- 4 **Consult a trusted advisor.** They will help you match CRM technology with your goals and budget.
- 5 **Only select features that you need.** Keep your CRM system functional and simple.
- 6 **Find a customizable system.** This will allow the system to line up with your needs and be altered down the road if needed.
- 7 **Champion your program.** As a program leader you need to be involved from start to finish, maintaining buy-in from everyone who uses CRM.
- 8 **Clean up all of your data.** Doing this prior to inputting into your CRM solution will keep it organized and working as intended.
- 9 **Map out how you will measure success.** Use benchmarks to help you use and adapt your system.
- 10 **Review the value and benefits of the system.** Consider whether the system is successful or unfulfilled. Make improvements to the program and keep it valuable to your business and customers.

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