Top 10 Tips for CRM

1. You must commit to becoming a customer-centric organisation if you want to benefit from having a CRM system in place. The customer is your revenue generator, so placing them at the heart of everything you do will create an opportunity to increase and manage your revenue for healthier results.

2. Never immediately commit to a CRM system You should ask the provider upfront if they will handle your project and how much they charge. The provider should always clearly identify goals for the system before you part with any money. Make a small up front investment prior to committing – this will let you see if you're making the right decision and could save you money in the long term.

3. Choose a supplier who will help you to use your CRM system as support for all internal and external relationships. Cultural change is always going to be the hardest nut to crack. - companies are becoming more diverse with multiple locations, multiple suppliers, partners and shareholders. The right CRM provider will help to support all of these associations. Your staff will feel more motivated because they suddenly feel informed, your supplier relationships will become stronger, your customers get greater levels of proactive service and all future prospects will be impressed when you hit them at the right time and with the right product.

4. Make sure that your CRM system suits your organisation. If you listened to every CRM solution vendor they would tell you that your system needs all the bells and whistles. Well you don't. CRM is about what you do with the technology, not how complex it is. What works for one organisation won't work for another. Make sure that the system you choose reflects your company objectives - defining a strategy is key to CRM success.

5. Plan extensively and don't scrimp on training! It's not possible to be too prepared for a CRM project. Ensure that you've gathered plenty of background information - it will arm you with project justifications, cost analysis and a good ROI argument. Also factor in training needs of your organisation - if you want your CRM system to be a success then it is essential that each individual member of staff receives training that is tailored to his or her job type and skill. Planning ahead will also help to speed up the process of finding the right system.

6. Don't be persuaded into implementing your CRM system in one go. Most CRM technology vendors will tell you that CRM is not a single department solution. This is quite true, but you don't have to go to the other extreme and deploy the system all at once! The most successful CRM projects are ones that get the full buy-in of the entire organisation but start in one or two departments before rolling out the system gently. This will ensure that all users feel comfortable and you'll experience minimal backlash from staff with knee-jerk reactions. Remember, as long as you have a project plan, you will get the entire organisation using CRM before you know it.

7. When you choose a CRM system, make sure it's based on current technology. Always ask to see a current version of the software as it is deployed today. Do not accept a system with a limited shelf life - understand your own replacement cycle and ensure that the software will grow with you.

8. Choose a system which will fit in with your back office. Accounts payable and accounts receivable data can form an integral part of CRM. You should always choose a technology that offers seamless integration with your back office – that way, you'll get the processes spot on. Having access to data detailing sales history as well as credit history could prove invaluable to a member of staff deciding whether or not to give a discount to that customer on the phone. The cost benefits of this approach are so great that some companies have reported an immediate ROI.

9. Always have a blueprint of how you want your CRM strategy to be implemented before you start implementing it. All the planning and strategising in the world won't make a difference if you start your roll out to the wrong team or at the wrong time. Share your plan with all stakeholders so that they understand how it will affect them before the changes take place. Perhaps you are hitting a particularly busy time of the week in one department or there are staff shortages in another which may prevent staff from being able to commit to training and remember that your internal staff are all customers too.

10. Test your software once it goes live. This is crucial. Once your new system goes live, some stakeholders can be very unforgiving if the technology and processes fail. As part of testing, it is also imperative that all back office integration is also working from day one. You should make a list of typical operations that each department may undertake and follow the process through to completion.