



Seven Secrets to Customer Relationship Management Success

Seven imperatives for running a successful CRM system

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Executive summary

Customer relationship management (CRM) is not a software program, though increasingly references to CRM tend to mean just that. The term is a broad one that covers many aspects of a company's relationship with its customer base. It is a holistic and all-inclusive approach adopted by a company to form an ongoing relationship with, and properly manage, all its customers.

Like many new markets, the CRM market place is an abundant source of 'buzz words' (generally designed to make executives feel important!), but if you dig past the surface these systems can help you strike gold. For example Sales Force Automation (SFA) and Marketing Automation can quickly help you increase marketing efficiency and direct money to the projects and campaigns that are delivering the best results.

Which flavour do you prefer?

Customer relationship management software comes in two broad forms: desktop based, and web based. Both have their advantages and disadvantages and they both perform the same basic functions.

A web based CRM software program has the advantage that it is not a resident program installed on a field operative's laptop. A field operative could even access a web based CRM system in an Internet café, or a friend's house - in fact, anywhere there is a reliable Internet connection and a computer.



When a company is looking to adopt a CRM system there are a number of things they should look out for, and a number of pertinent questions they should be asking themselves. All too often a small company will buy the best CRM system they can afford and start from there. This is usually a recipe for disaster.

However, with careful planning, a successful CRM rollout is not really difficult at all. Just bear in mind that you are purchasing a CRM solution to achieve better Sales Force Automation. It's not just fancy software; it should be doing the robotic jobs and freeing up employees to do the tricky ones.

Now let's now look at some of the keys to deploying a successful CRM system.

1 Needs and wants

First of all a small company should be fully clear on what they need to achieve. Is the CRM system going to make life easier for the company? Or will all the training and readjusting necessary be more trouble than it's worth?

It is essential that the system should support the goals of your company. These may include;

- Helping sales people manage and close business
- Providing a centralised and visible location for the company's sales pipeline - instead of hiding it away in dusty spreadsheets
- Giving managers the information they need to make better decisions
- To provide a complete picture of every customer to anyone who needs it in your company
- The ability to test, measure and modify business, sales and marketing activities to ensure the best return and outcome
- Providing better service for your customers



Most would agree that “all of the above” would be desirable. Be careful to choose a system that can handle the various functions you require of it both now and in the future.

But perhaps the most important point of all is this; is the “C” part of CRM getting the planning focus it needs? CRM is all about the relationship with, and the management of, a company’s customers. If they don’t end up with a better experience, which in turn will benefit the company, then why bother adopting a CRM?

2 Everything to everybody

Don’t try and design a system that is everything to everybody. Use the MoSCoW principle and decide whether a suggestion is a Must, Should, Could or Want. This is important if you don’t want to end up with a system of such technical complexity that it will fall over all the time and such user complexity that no one will ever use it!

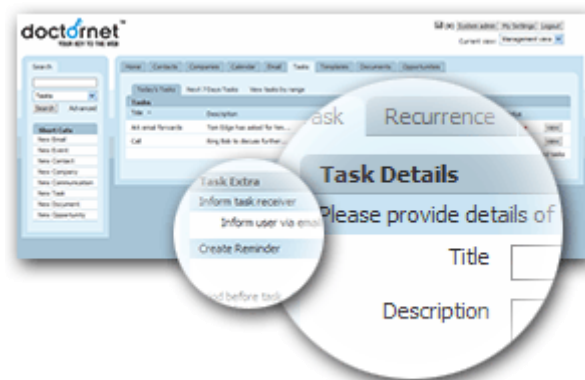
3 Who’s serving who?

It may seem obvious, but for many small companies it is not: make sure the CRM system fits the company’s needs - not the other way round. If the needs of the company is fitted to a CRM system it won’t work. What I mean is, no company, large or small, should have to radically rearrange their normal practices to accommodate a new software system. That causes too much damaging disruption. Make sure that the company’s customer relationship management policies are incorporated into the software every time.

4 Top down & Evangelists

It’s important to roll out the CRM from the top down and not the bottom up. If senior management are seen to be using the system then this behaviour will be reinforced down through the company. If they don’t then the project is doomed from the start.

Also insure that you have an evangelist in each department. By evangelist I mean a member of the team who is positive and successful and commands the respect of their colleagues. When that person enthuses about the system their colleagues will approach the CRM in a positive light and will help faster and more successful adoption within the department.

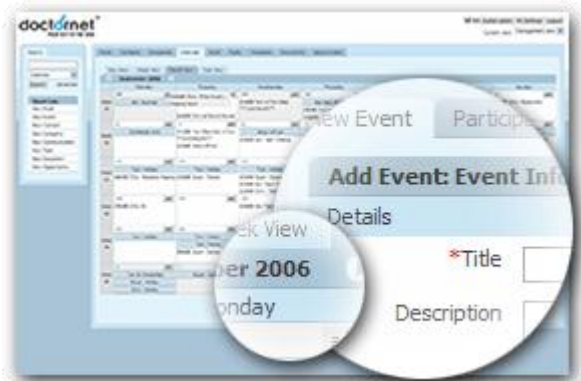


5 Data Basics

Ensure that someone has the responsibility to own the data and make sure that it is accurate and up to date. This job could be split across more than one person: the sales administrators for the sales teams and a marketing communications person for the marketing data. A good sales administrator will nag sales people to fill the source field in, make sure that dead leads get recycled back into marketing, that addresses are complete and that PA’s don’t get emailed.

6 Security first

Ensure that your data will remain safe at all times. Security is paramount. Your customers have a value that cannot be measured. They trust you. You have probably built up that level of trust over many years. That is the relationship you have with them. Manage it properly by ensuring at every level that the security in place in your CRM solution is second to none.



SprintCRM can:

- Help your sales people manage and close business
- Provide a centralised and visible location for the company's sales pipeline - instead of hiding it away in dusty spreadsheets
- Give managers the information they need to make better decisions
- Provide a complete picture of every customer to anyone who needs it in your company
- Give you the ability to test, measure and modify business, sales and marketing activities to ensure the best return and outcome
- Provide better service for your customers

7 The right man for the job

Bring in the experts when it comes to providing training for your sales force. Don't rely on Bob who has read most of the manual during his lunch break. One of the main keys to success in all of this is having a properly trained sales force that fully understands how to use the software, whether in the office or out in the field.

Conclusion

A good customer relationship management system can easily help you achieve your company's goals - paying for itself in no time at all. Remember to be both clear and realistic on your objectives, follow the seven keys above and most importantly of all make sure that however you manage your customer relationships that the customer and their need is always at the centre of your strategy.

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