



# Starting right with CRM

## How to avoid common implementation challenges

A CRM system is a fundamental building block in any customer engagement strategy. Well architected and managed, it enables you to gain that single view of customer that is so critical to unlocking value from your customer relationships.

**However, too many CRM implementations fail to realise their desired impact, and this is usually for one or more of the following reasons:**

- Clear goals are not defined up front for the CRM program.
- The CRM project is not driven by the business users who need it most.
- Subject matter experts inside the business are not involved in the CRM implementation, or don't have time to participate.
- The organisation cuts corners on change management.
- No resources are assigned specific responsibility for the CRM administration on an ongoing basis leading to maintenance and data integrity issues down the track.

**Set clear goals** - If you know up front what success looks like, you are in a far better position to manage a successful implementation project. That's because the goals give you a framework to clarify requirements, make trade-offs and prioritise.

Before you start a CRM project, ensure that the leadership team in your organisation agrees on what specific, measurable outcomes the CRM project needs to deliver.



For example:

- New assets for the organisation (eg clean customer data).
- New customer segmentation and marketing capability, to support revenue growth objectives.
- Automation of workflows to improve the customer experience, or enable cost reduction.

**Focus from the start on user adoption** – User adoption is a fundamental driver of CRM implementation success. By involving a broad cross section of stakeholders in the project from the very beginning, you have the best chance of generating engagement in the CRM journey, which is key to long term adoption.

Furthermore, subject matter experts in your business are the people who will make sure the solution covers all needs accurately, which is also key for long term adoption.

What we find, however, is that too often it's the "people stuff" that gets cut as organisations prepare for CRM projects. They don't invest in change management, and they don't backfill roles to allow the right people to play their part in the project itself. Making these investments may be the best price you can pay to lock in CRM success.

**Be agile, learn as you go** - While we don't necessarily think that agile project methodology works for everyone, we do think there are some principles that sit behind agile that are relevant to all. Most noticeably, we see the merit in devising an implementation roadmap that sees you delivering work in smaller phases. By doing so, you can:

- Deliver value to the organisation sooner.
- Deliver each phase more efficiently.
- Reduce risk and cost - research shows that, if large software projects are implemented in one step, estimation errors and overspend are too often the case. This is simply because we cannot know everything upfront. Breaking the work down into smaller phases reduces those risks.



**Show leadership and commitment** - Given the central role that a CRM plays in any customer engagement strategy, you have the best chance of realizing a return on your investment if senior stakeholders from across customer-facing and key operational divisions are involved. This involvement may be in the form of a steering committee, as well as active participation in the scoping of the CRM solution. Senior stakeholders also have a vital role to play in helping drive adoption, by participating in the change strategy and role modelling usage of the CRM post go-live.