Improving your SugarCRM solution - a checklist

If your existing CRM is not working as well as planned, you need to ensure that any further CRM investment is worthwhile.

There are a range of reasons why a CRM disappoints. So before you get started on trying to fix what's broken, it is very important to assess why you are in this position. And then it's time to plan the next steps, with confidence that your efforts and investment will deliver improvements and impact.

Loaded has over ten years' experience designing, implementing and supporting CRMs for clients of all sizes around Australia. We've seen it all! We've distilled here a checklist to help you prepare for a CRM improvement phase, based on our experience and insights.

Main reasons for changing a CRM...

CRM is difficult to use, or it's not used at all.

CRM data is unreliable or inaccurate.

CRM program is costing too much.

Your CRM improvement plan checklist

Review and assess - Assemble key CRM stakeholders and identify the main reasons for the CRM pain points you face today. To get you started, see the box above.

Gain executive support for change - Discuss the CRM status with senior stakeholders who collectively 'own' the customer and organisation strategy. Clarify the organisation's CRM objectives. Determine what is appropriate to invest, to get the CRM program back on track.

Find an implementation partner that you can trust - Your implementation partner can make or break your CRM program's success. You need to find a partner with a highly skilled team, that understands your CRM system deeply and also understands CRM best practice more generally. The partner needs to be commercial and business oriented, not just focused on technical matters. Ideally, they have worked inside organisations that use CRMs, as well as in professional services environments. And they need to be able to demonstrate the quality of their systems, processes and client work, so you know you will be in safe hands.

Ask for an audit, as a first step - Take things one step at a time, as you will most likely be working with a new implementation partner and you want to make sure you've found the right fit. You also want to ensure that whatever work you invest in now, delivers tangible improvements. An audit is an ideal way to start, and if it's well run, you will come out of it clearer about what you're trying to achieve as an organisation, as well as clearer about why things have derailed in the first place.

Loaded's CRM audit approach

Our process - When we undertake an audit of a new client's existing CRM, we follow a standard process which endeavours to uncover the root cause of issues. We identify the gap between targeted CRM outcomes and the status of the CRM solution today, and devise a plan to bridge that gap. Next steps can include technical fixes, minor enhancements, training and coaching, and more extensive adaptations to the CRM.