ZOHO CRM

8 TIPS for Successful CRM Implementation

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1. Use the CRM system
2. Customize the system at all possible levels.
3. Don't force-fit features you don't need.
4. Automate routine. Use your time for what's important.
5. Ensure data security.
6. Connect the jigsaw pieces.
7. Analyze. Improve.
8. Review, revamp, and re-discover.

8 TIPS for Successful CRM Implementation

The global market for Customer Relationship Management **(CRM) software is projected to reach US$48.4 billion by 2020,** driven by growing concerns among enterprises over high customer attrition rates...

New Report by Global Industry Analysts, Inc.

Businesses worldwide have realized the importance of a CRM system. When almost every company uses some form of CRM or the other, it is observed that many tools are not explored to their full potential, or not even used.

When you have just purchased a CRM system, it may be fine to start with minimal usage and data input. In the long term, however, if you are expecting a good ROI from your CRM investment, you will need to make the best use of all the available features based on your business requirements, while looking out for the changing dynamics and trends in the CRM market.

If you think your job is done after you've deployed your CRM, think again. You're just getting started.

Here are eight useful tips to help you use your CRM in the best way possible, improve your productivity, and drive a much higher return on your investment.

TIP #1 Use the CRM system.

While you, as a small business owner or IT manager, may be convinced about using a specific CRM tool, make sure that you communicate its advantages to all your intended users. After all, the whole point of a CRM is to make reps' lives easier. You won't be able to see the real benefits of deploying a CRM system unless your entire sales team uses it end to end.
This tip is important, which is why it comes first; the other seven are entirely based on the usage of your CRM system.

> Change is hard at first, messy in the middle, and gorgeous at the end.
> ROBIN SHARMA, Founder of Sharma Leadership International (SLI)

Although it might take a while for users to get accustomed to the new system, the more they use the CRM, the more value it adds to your business. To understand the way your CRM works, takes serious dedication.

Here are some suggestions to encourage your reps to adopt the new CRM system faster:

Use focus groups to evaluate different CRM tools, and include their feedback during your decision making.

Onboard all users into the CRM system, and make sure that everyone uses it daily.

Watch, and distribute training videos that will help reps understand how to use the system efficiently.

Make the CRM system easier for users by

- Keeping all the form entries as minimal as possible
- Having as few mandatory fields as possible
- Having contextual information filled in at each stage instead of going through the full form for every update

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Implement a strong lead conversion workflow in your CRM at the beginning. If you take this step, you'll ensure that there is a clear process in place so that everyone, starting from senior executives to new hires, follows it unanimously.

TIP #2

Customize the system at all possible levels.

A customized CRM makes a huge difference to your business. It's what makes it go from being *the* CRM to *your* CRM. By setting up the system based on how your business operates, you make the CRM system immediately more familiar to users. And when it's more familiar to them, they're more likely to adopt it.

For example, if you're into real estate, naming modules and fields "Apartments," "House Owners," "Buyers," etc. helps users know their way around the CRM system.

Before you customize your CRM, it's important to think about these five questions first.

Who are the key stakeholders of my business?

Where do my leads come from?

What information about my leads do I want to capture in CRM?

What is my lead conversion process, and what stages are involved?

What are the templates (email, invoice or mail merge) involved in my business transactions?

Customization can be done based on the organization and also based on the users. Like how you customize the CRM overall to reflect your business process, every user can also customize it based on their personal preferences and requirements.

TIP
#3

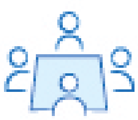
Don't force-fit features you don't need.

ROI is not always about making profits. What's equally important is to save yourself from potential costs.

Always be clear on what you are expecting from your CRM system. There might be a lot of features that would be really useful for your business. At the same time, however, remember that there might even be features the CRM vendor lures you into buying with their marketing.

For example, if your business involves a lot of customer calling and traditional face-to-face transactions, you probably don't need website intelligence. If your website is not a major source for leads, but you're still spending some money on visitor insights and live chat tools, you're running the risk of unnecessarily complicating your CRM by adding features that aren't essential. Stay focused. Ask yourself, "Do these features really add value to my business?"

Here are some additional points to keep in mind:



Never let a vendor define your business needs. Talk to employees from several teams and understand their priorities.

Only deploy features that are truly needed for your business, and make sure you don't spend extra money for anything that isn't absolutely necessary.

When your CRM vendor says something along the lines of "Trust me, this is exactly what you need for your business!" do not give them the benefit of the doubt. Try the feature out for yourself, and then decide.

TIP
#4

Automate routine. Use your time for what's important.

The best part of having a CRM solution is that it cuts down on many of the routine tasks you normally do manually, giving you ample time to focus on the areas that matter most.

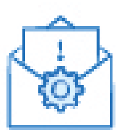
For example, **there are certain things that sales reps do right after their client visits like**

- Send a follow-up email to the clients
- Update a status field of the deal
- Create a task to follow-up again with a call in a couple days if the client doesn't respond

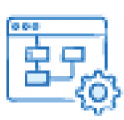
On average, a rep spends about 15 minutes after each visit completing these repetitive tasks, which would total to about an hour or two each day. What if all of this could be done with a single click on the go? With automation, it's possible.

By making it easier to send out prompt follow-ups, automation not only saves you time, but also keeps your customers engaged with your brand, not your competition's. Go over your sales process, pinpoint where the repetitive tasks are, and automate them.

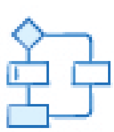
Here are a few suggestions to get started with automation and streamline your process:



Automate the sending of email alerts to your prospects when they sign up or fill out your Contact-Us form.



See if you can automate the assignment of leads and follow-up tasks to sales reps.



Create workflow rules and associate certain actions to be triggered by specific conditions. (When records meet these conditions, the actions get automatically executed.)

TIP
#5

Ensure data security.

Your business deals with sensitive and confidential customer information, from something as simple as an email address to price quotes and SLAs. Therefore, ensuring that the data in your CRM is secure is very important.

Here's a checklist of the steps you can take to keep your CRM account safe:

Set up IP-level restrictions, and make sure that your data is accessible only from select, secure networks.

Enable an additional layer of security, like two-factor authentication, to secure your account with the combination of a password and a mobile device. This protects your data and reduces the chances of your account being hacked into.

Based on your organization's role hierarchy, make sure that you have different levels of data access for users, administrators, etc. Define clear roles and groups in your CRM.

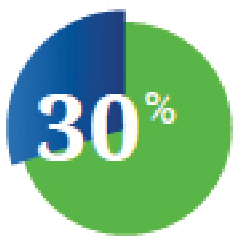
Set data permissions for various roles, and share documents very carefully.

Make sure that you run data back-ups at regular intervals to ensure no data is lost.

TIP #6

Connect the jigsaw pieces.

Businesses do not run on a single app anymore. You have your website, your email service provider, your social media sites, your pbx systems, and a lot more applications involved. With every app you use, you leave some information about your customers and your business transactions. But as long as the information is dispersed in silos, you will never be able to get a holistic picture of your own business, let alone give an amazing customer experience. Similar to a jigsaw puzzle, it's only when you connect all the pieces that you get the complete picture.



30% of marketers say having disparate data sources is the main reason they can't glean useful insights from customer data

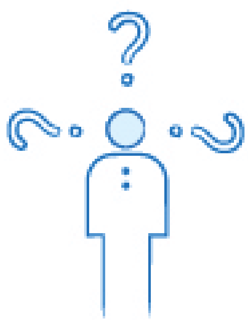
Nucleus Research

Let's look at an example. When your CRM system is integrated with your email system, you can

- Send and receive emails within your CRM.
- Keep all your customer emails inside CRM to communicate with context.
- Check open rates of emails, filter prospects based on their level of interest and make a more aggressive sales pitch.
- Get reports on email analytics and find the best performing email templates by click rate, open rate, bounce etc.

For these reasons, we advocate that you keep your CRM as the central platform for all your transactions and interchanges with prospects and customers. The more data you feed into the system, the more intelligence you can derive out of it. From a phone call to an email to a support ticket to a social media mention, make sure that every piece of data is captured within your CRM. How do you do that ?

First think about these three simple questions:



Where do I find my prospects?

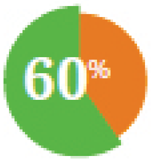
Where all do my prospects find me and approach me for business?

How do I communicate with my prospects and customers, or through what channels?

Once you have the answers for these questions, make sure that your CRM system is ready to automatically capture information from each of those mediums. Visit your CRM vendor's marketplace, and explore their third-party integrations.

TIP
#7

Analyze. Improve.



Almost 60% of respondents said that the primary reason they needed a CRM was to have a centralized customer database.
A recent survey conducted by Capterra.

Many businesses still use their CRM system simply for storing customer information. But a CRM can definitely do much more than that. You will be amazed to see how much you can learn from your own business data that could help you analyze your current business and plan for the future. Features like reports, dashboards, forecasting, etc., makes planning for the future easier and more effective.

They help you with answers for specific questions like:

- How many more deals do I need to close to attain my quota this month?
- How is my team performing?
- What is my expected sales in the upcoming quarter?
- How is my business faring against the same period last year?
- What is the average sales cycle duration?

Make sure that you

Extensively use the reports, dashboards, and forecasting modules.

Create custom reports that analyze the metrics you need to know.

Embrace AI. Many CRM tools are introducing artificial intelligence (AI) and machine learning in their system. By providing performance-based interpretations and solutions for your teams and individual reps, AI could make a world of difference in your business analytics.

TIP #8

Review, revamp, and re-discover.

Last but not least: Always watch out for what's trending in the market, and make sure that your CRM system supports the functionality. Keep an eye out for major feature updates from your CRM vendor. It's not wise to permanently stick with the same set of features. You cannot live up to your customer expectations with an outdated CRM system. You'd ultimately lose them to competitors who pick up the market vibes faster.

Remember these important points:

Be quick to adopt new features in your CRM. It's okay to experiment with a small feature set and for that experiment to fail, but the key in business is to fail quickly and understand what works best for you.

Every once in a while, take some time to review your setup. Trash the old reports or dashboards that don't work for you anymore. Create new workflows wherever necessary.

Meet with your sales reps every now and then to understand what their difficulties are in using the CRM daily. Their feedback is very important.

Use Google Alerts for specific keywords on CRM and your CRM vendor. You will get instant alerts on all the news surrounding these topics from Google.

As the CRM industry continues to grow, make sure you take advantage of its growth to fuel yours.

Feel free to talk to the CRM experts when you're in doubt. These people could be your own sales managers, the CRM vendor you decide to go with, or other small business owners who also use a CRM. Pick their brain to implement new features. Look for help online and offline. Participate in forum discussions where you can ask questions and post answers. See if your CRM vendor has a forum site where users can ask questions and help each other out. Take advantage of workshops and user conferences to meet more users like you and share valuable insights.

If you set up your CRM system to work the way you do, whatever CRM system you choose will help you deliver great customer experiences, which, in turn, helps you generate great revenue.

Authorized Partner

prowl communications

Debi Katsmar

Marketing Strategist, Email Marketing & CRM Specialist

Direct: 905-321-5097 Office: 905-734-8273

debi@prowlcommunications.com

www.prowlcommunications.com