

SUCCESS TIPS FOR THE 6% CLUB – SHAREPOINT CRM

“Somewhere close to 94% of CRM Implementations
FAIL to meet their organization’s goals and objectives!

During our 16 years in the CRM software business we have identified the most common reasons that a CRM system fails to meet expectations.

If you incorporate even a few of these points into your roll out plan you will most definitely increase your return on investment.

BE ONE OF THE 6% SUCCESS STORIES

If you want to be one of the 6% who can define how their CRM has benefitted their business then you will have earned the rewards that result should bring.

CRM has been around for many years but unfortunately today it often seems as misunderstood as it always has been.

Take just a few of these light hearted steps seriously and you will definitely join the “6% Club”!

DON'T TRY TO EAT AN ELEPHANT AT ONE SITTING



The general assumption is that since CRM has been around for years that it should be “out of the box” ready to deliver results! Right?

Wrong!

Of course you can sign up for one of the \$10 per user per month systems and start entering data within 5 minutes.

But....if you want to join the “6% Club” then you must have a plan, an objective and a timeline. You must recognize this type of software will impact how things are currently done. [That is what you want to change, right?Just checking....]

A CRM must be molded to support your business before it can really begin to deliver solid results.

This process takes time [just like getting into that new swimsuit for summer!].

Don't set yourself up for failure by tackling 10 years of business issues all in one day!

LOOK FOR THE SWEET SPOT



We knew a company that had an employee who, for years refused to use the CRM system. He came up with every excuse and his boss was pulling his hair out because this guy was important to the business.

Then one day the boss decided to try something new and sat down with the guy and asked him what would need to change about the system to make him use it. And the guy told him a very small change would do it. The boss made this change and immediately the guy was a convert!

This is what finding the “sweet spot” is about. Talk to your people – look for their sweet spot and give it to them (within reason of course!) and bang... you may have the results you are seeking.

SUPPORT YOUR PEOPLE ALL OF THE TIME



Although personal computers have been around since the early '90s it still takes time for people to learn new systems.

What takes the most time however is changing how people work. Probably they are used to working in email all day and now suddenly they have another system to think about. It may seem like more work because they have not received the personal benefit from the system yet.

Don't make the common mistake of underestimating the time and effort it will take Users to adapt to the changes.

As much as we encourage supporting Users sometimes they need a little fire underneath them to "help" them move along until new behaviors become habitual. If you put out an email with a support number and then do nothing to hold them accountable.....well don't be surprised if they carry on the way they always have.

DON'T EXPECT MIRACLES OUT OF THE GATE



Now, if we are 30 lbs overweight we must realize that 2 weeks in the gym will not lose that weight! A CRM implementation is no different. Many a CRM implementation has gone awry for the simple reason that everyone expected immediate results and when those results were not there, it was easy for the "naysayers" to say "See, I told you so....."

A CRM is an essential tool in today's chaotic business world and it's likely you have waited a long time to roll out one. Accepting that "real" results come with time takes the pressure off the desire to see miracles right out of the gate.

DON'T DESPAIR: NOT EVERYONE WILL SHARE YOUR EXCITEMENT!



Start with accepting that not everyone in your organization will be excited about the changes coming. In fact some may call it “Big Brother” or even become active resisters.

Begin with confidence and assurance that the new system is here to stay and by trying to find everyone’s “sweet spot” and offering firm but supportive assistance along the way your users will become converts.

You can also include users in the roll-out process and make them part of the process. People like to feel they can impact their work environment and they usually have a lot of ideas to share.

LET YOUR CREATIVE SIDE OUT!



It’s easy to fall for “features and functions”! We want to believe that a software application will deliver us instant solutions for our business challenges. Unfortunately this is rarely the case unless the software addresses only one specific requirement.

The real value of a Centralized Relationship Management system comes about when the information gathered is leveraged across teams, analyzed and acted upon. This process enables the development of standardized best practices which you can use to increase business efficiencies.

By developing creative strategies to help you get the results you wish to see from the CRM system you will gallop toward success!

MAKE PEOPLE ACCOUNTABLE TO EACH OTHER!



Now here is a real kicker....it's so obvious that sometimes we just overlook it.

Create an environment where colleagues and peers' processes weave through the CRM platform.

Now that you are familiar with looking for sweet spots and thinking creatively it's just a hop – skip to finding those steps (or it could be only one) that makes the users accountable to the CRM because of their accountability to their peers.

There is much talk about “Management Buy-In” in relation to successful CRM implementations; however when users become accountable to their peers miracles just might happen faster than you think.

WHO LOVES YOUR CRM?



CRM systems do not manage themselves unfortunately! With the valuable “business intelligence” data gathering daily it would be a shame to allow it to fall into disarray!

Assign a CRM “Mama” (yes typically this is better done by a female – don't ask why!) who will take ownership of the data integrity and help you drive standardized usage.

Your “Mama” will ensure the CRM is primed and ready for immediate action when you need it to kick into high gear for marketing and to ensure that none of your customers are without a “next step” by their Account Manager.

As well she will be on the lookout for those people who are not pulling their weight and will give them a swift and loving “kick-start”.

FIND A ROLE FOR OUTLOOK



Absolutely, we all use Outlook! Who could live without email coming at us 24/7?

One of the biggest factors of CRM failures is the downright misunderstanding of how to fit email into the CRM and I don't mean "how to save one". And because this is so difficult to achieve, users get fed up waiting for a solution and go back to using email to run their days until someone figures it all out. Now believe me, you don't want this happening!

The funny thing is that most organizations started looking for a CRM because they lost control of who is talking to whom, about what and who is promising who – what.

.....then the first question they ask is "how do I save email to the CRM".

Rather than deal with this "Moose on the Road" some folks just want to nip around it but...the truth is that it must be dealt with and a solution – that meets your business needs – must be figured out.

Ask yourself the question "How does email communication fit within our concept of CRM?" Stay focused on the big picture – the reasons you are putting a CRM into your business and the objectives and outcomes you want to realize.

Definitely – email as a business communication platform is not going away and we must find the best solution for our business because simply creating a secondary email store inside the CRM is a waste of effort and will most likely not produce a serious business benefit anyway.

DON'T GIVE UP HALF WAY UP THE MOUNTAIN!



If there is one final reason more than any other that CRM implementations fail to meet expectations it is that people simply give up working at it.

If you have ever been a gym member for one year and have suffered through Jan/Feb then you will know what I mean. Those New Year's resolutions keep the gym hopping for about 2 months before things return to normal. When these folks don't get the instant gratification they dreamed of they give up!

The sad part is that they didn't wait long enough to see the fantastic results their gym membership could give them if they demonstrated a solid commitment and worked toward a realistic goal.

CRM systems can deliver unbelievable benefits, including efficiency gains through improved collaboration and access to valuable information — not to mention improved customer service and prospect marketing.

Knowledge comes from information and is a powerful reason to keep driving the CRM program.

Stay the course and the results will begin to happen. Heh...no one said it was going to be easy – at least WE didn't! 😊

PRACTICAL STEPS

1. Bring your CRM to life with Data – combine Outlook files, Excel and Accounting records to pull together a Customer and Prospect Accounts List. Nothing worse than introducing users to an empty system.
2. Determine Fields required for each Module – Sales Tracking, Marketing, Client Relations, etc.
3. Define straightforward and achievable processes for your users to kick start them with the new system?
4. Figure out feedback loops that drive value for all.
5. Integrate it with your Accounting/ERP system for maximum value. Bringing account history into the CRM is a powerful way to drive adoption faster than anything.
6. Don't forget about ongoing support and training.



Use these ideas with consistency and determination to realize the many benefits your business will gain with a CRM system in place.

Don't hesitate to contact us if you need assistance with any of the points raised above. We are here to help.

Customer success is more important to us than simply selling software!

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