

THE 10 ESSENTIAL STEPS

FOR A SUCCESSFUL CRM
IMPLEMENTATION



By the XTIVIA CRM Team

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1

Determine a budget
for your project



Step 1: Determine a budget for your project

Having a solid CRM strategy is important for building long-term success with your clients, make sure you allow enough budget for your CRM strategy to flourish. Without a CRM system in place, you may lose touch with your clientele your company would have otherwise secured with a CRM system.

Allocating the necessary budget to adopt a CRM system will create a strong foundation and make it easier to generate sales. Don't lose money by neglecting the budgeting needs of a solid CRM system—or worse, avoid setting up a CRM environment altogether. A typical budget per person is typical \$2,000 for a fully-utilized CRM system.

With a proper budgeted CRM interface, your company will improve internal communications, observe marketing trends, and pursue leads.

2

Ensure you have
high-level corporate
adoption



Step 2: Ensure you have high-level corporate adoption

The CRM strategy chosen by your company must be utilized throughout your infrastructure, meaning all levels of management need to adapt your CRM strategy and use the services it provides. A company-wide acceptance plan of your chosen CRM solution will ensure a high return on your CRM investment. Without high-level corporate sponsorship, you run the risk of your team not applying themselves to the system as much as they should. Fortunately, using a CRM system actually makes your work life easier.

For example, let's say your company has three department heads, representing Finance, Sales, and Marketing, respectively. Suppose each of these department heads has a preference towards a distinct software program for communicating with their staff, e.g. Excel spreadsheets. That's fine—until the Finance department has information that could be valuable for the Sales team but it's not on the spreadsheet. Using a CRM system unifies the company, all teams enter their specific information, which allows everyone to see the same customer data, getting them up to speed much faster.



Create an internal CRM Team



Step 3: Create an internal CRM team

These are specialists from each of your teams that will help plan the CRM strategy, implement the CRM system, and remain in place after your CRM system is active becoming champions. The Internal CRM Team's objective is two-fold, ensure your new CRM system integrates smoothly with your company and help resolve any concerns company personnel might have after the CRM implementation takes effect.

For instance, suppose John in the Sales Team is having trouble accepting the new CRM. He keeps his client records in his own spreadsheet and whenever he needs to report to his boss, Jane, about his earnings, he sends her an email. In a case like this, the Internal CRM Team will help John integrate his sales data into the new system streamlining the way he communicates with Jane, which she can now pull-up anytime without having to ask John to forward her his spreadsheet. They'll walk him through the steps necessary to help him take full advantage of the system, which will, in turn, improve his company's communication infrastructure.

A. Overview

So you may be asking yourself, “Who should make up the Internal CRM Team?” Ideally, this team should have at least one individual from the following areas:

Management



IT



Sales



Marketing



Customer Service



B. Management



Having a manager on the CRM team is very important as it supports the necessity for managers to make use of the new CRM system once implemented. If it is overlooked during integration it will negatively impact the whole process from the get-go. Managers need to embrace your CRM environment from the beginning and set an example for their teams. If adopting a new Customer Relationship Management system is a battle, then the managers are responsible for leading the charge. Conversely, a manager who shrugs off the critical moment, e.g., the “charge” into new CRM territory, it creates an environment of uncertainty. Bottom Line: Managers are crucial in CRM integration. Appointing the managers most familiar with your business to join the Internal CRM Team may be a good idea.



From addressing technical issues with your new interface to setting up storage preferences, IT personal offer invaluable support in all phases of CRM integration. Have one of them on the Internal CRM Team as a point of contact for other departments.

D. Sales



Salespeople will take tremendous advantage of the benefits offered by your new CRM system. They rely on the CRM system for leads and accessing data from customers, past and present. Because salespeople can spend so much time in a CRM interface, having a member of this team is crucial in the Internal CRM Team. They can address any concerns their fellow sales associates may have and act as a liaison between their colleagues and management.

E. Marketing



As with sales, marketing is going to depend on your chosen CRM system. By governing multiple methods of marketing campaigns in one environment, Customer Relationship Management allows prospective client outreach to achieve unprecedented heights. As such, a representative from Marketing is vital on the Internal CRM Team, since he or she understands the benefits the new CRM system provides to their department—and the company as a whole. Their marketing campaigns henceforth will likewise rely on the CRM system, and the unification of various marketing initiatives in one easy-to-manage interface will bring success for years to come.

F. Customer Service



The Business-Customer relationship does not end after the sale is closed. On the contrary, this relationship requires continual nourishment, and the CRM system does just that. Customers will have questions about the product or service they bought, and with a strong CRM system in place will help customer service reps do their best work. Have a customer service associate on the Internal CRM Team who is well-versed in all aspects of the CRM structure. After all, “customer relationship” is in the CRM title, and such a link is fostered through the excellent service your company provides—right here in your new CRM system.

4

Determine the Main
Goals & Objectives of
your CRM Project



Step 4: Determine the main goals & objectives of your CRM project

There are countless reasons for adopting a CRM strategy and they varied based on your company's unique needs.

Perhaps your business goal is to use a CRM interface to ensure everyone has access to the same database for clientele. This uniform organization not only helps personnel gain quick access to customer information but ensures everyone has the same data. To illustrate, suppose a customer service rep needs to look at a particular customer's purchase data. Your new CRM gives this associate access to the exact same data the sales team entered when they closed the sale and can perform a quality check on this data. Further, any updates to this information will appear seamlessly in your CRM interface.

Whatever your CRM goals and objectives may be, identifying these steps in the planning phase is crucial. Once these aims are established, you can customize your CRM experience to your company's individualized needs.

5

Identify Any Critical
IT, Architecture, or
Timing Issues



Step 5: Identify any critical IT, architecture, or timing issues

Maybe the implementation of this new CRM system has a few technological issues to work out, or perhaps the CRM needs a better integration with your company's cloud service. Regardless of what issues arise, take advantage of this step in the implementation process to work out any kinks as your company transitions into your new CRM system.

For example, if your IT team is concerned about having your data hosted in the Cloud, you may want to target an On-Premise CRM solution.



Implement Your CRM Solution in a Phased Approach



Step 6: Implement your CRM solution in a phased approach

By launching a CRM initiative you may find have a lot you want to accomplish. However, trying to do it all at once can lead to issues such as:

- Organizational Disruption
- Technology & Organizational Absorption
- Cost
- Change in Management
- Need Prioritization

On the other hand, with a properly implemented CRM system, your company will get a more immediate return on investment!



Train, Train, & Train
Some More!



Step 7: Train, train, & train some more!

The importance of training your personnel on the use of your CRM interface cannot be emphasized enough. Once everyone buys into the implementation of your CRM system, you'd be amazed at how much your company workflow will improve!

If you do not get your users the proper training on the new system, you are asking for trouble. If possible, we always recommend in-person, classroom-style End-User training for each of the new users. This training should be tailored towards how they will be utilizing the system in their daily work lives, and include your business processes and best practices.

Administrative training for power users is always recommended in addition to the End-User training.



Measure Your Team's Performance



Step 8: Measure your team's performance

Make sure to measure the results after the implementation has taken effect. For example, track the number of calls reps are making or the number of lead opportunities created vs. won opportunities.

Build-in certain success measures to track the level of success of the implementation. These measurements can include department usage within your company, sales stats since implementation, and so on. Various ways of measuring the impact of your new CRM system can help you fix problem areas to better your implementation as you reach the final steps of the procedure.



Measure your New CRM System's Performance



Step 9: Measure your new CRM System's Performance

Analytics tools and metrics can be extraordinarily helpful in measuring your past performance, which, in turn, can serve as indicators of future success. Having an organized CRM system in place can help your company identify problem areas that, without this new CRM environment, would have remained invisible.

Maybe your company missed an opportunity to re-market to a previous customer who purchased a similar product from a competitor because their information was not in an easy-to-access location in your old database. Now that everything is in place and user-friendly in your new CRM system, imagine the business opportunities that will appear!

10

Provide Adequate,
Ongoing Support



Step 10: Provide adequate, ongoing support

In order for your CRM team to achieve the best success, you need to provide them with ongoing support. Not only should your implementation partner (such as XTIVIA) be there to provide support when questions or issues arise, your internal CRM team should also help with support.

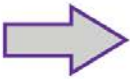
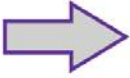
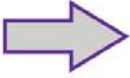
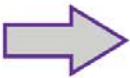
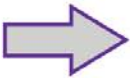
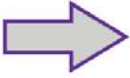

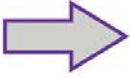
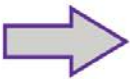
Users who can also serve as administrators and others who can act as power-users within each department can help your organization lead to the most successful launch. Users need people internally who fully understand their business and how the CRM can support its various goals. Ensuring such people are ready to answer questions or address issues leads to seamless and successful CRM implementations.

Follow these steps and watch your company grow in your newly-implemented CRM system!

Print out XTIVIA's checklist below to ensure a smooth CRM integration!



10 Step CRM Integration Checklist

Step 1		Determine a Budget for your Project	<input type="checkbox"/>
Step 2		Ensure you have High-Level Corporate Adoption	<input type="checkbox"/>
Step 3		Create an Internal CRM Team (Management, IT, Sales, Marketing, & Customer Service)	<input type="checkbox"/>
Step 4		Determine the Main Goals & Objectives of your CRM Project	<input type="checkbox"/>
Step 5		Identify any Critical IT, Architecture, or Timing Issues	<input type="checkbox"/>
Step 6		Implement your CRM Solution in a Phased Approach	<input type="checkbox"/>
Step 7		Train, Train, and Train Some More!	<input type="checkbox"/>
Step 8		Measure your Team's Performance	<input type="checkbox"/>
Step 9		Measure your New CRM System's Performance	<input type="checkbox"/>
Step 10		Provide Adequate, Ongoing Support	<input type="checkbox"/>

Thanks for reading the

Ten Essential Steps for a Successful CRM Integration

Need CRM Development?
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Or visit xtivia.com for more info

