Maximizer Software
Simply Successful CRM

7 Steps
to Enhance CRM Performance

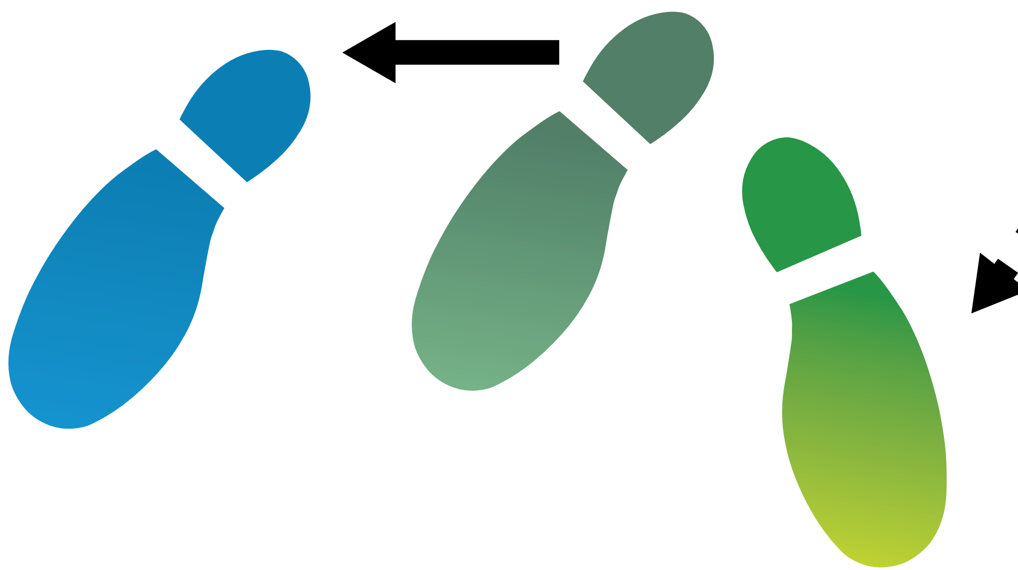

Table of Contents

Enhancing CRM

A successful Customer Relationship Management initiative is about more than just the technology. Your CRM initiative touches people, both employees and customers, and changes the way they interact.

In this e-book, we will explore the simple steps your organisation can take to leverage the full power of CRM.

Learn how to develop a CRM Roadmap, increase end-user adoption and tips on how to identify quick wins which deliver immediate results. You will walk away with a clear plan on how to optimise your entire CRM process.

Step 1: Define Processes

Determine the impact of current processes and identify new ones that will support the continued growth and goals of your business. With introduction of new technology or business expansion, processes change and new ones are often needed.

Identify organisational goals and objectives

Review one year and five year plans and go through your SWOT (strengths, weaknesses/limitations, opportunities, and threats) analysis with your executive team to identify business goals and objectives.

Define metrics to track performance

These can include reports, customer tracking, forecasting and various other activities. Integrating your CRM with software such as financial or ERP may be the most effective and efficient way to gain insight into some of these.

Map objectives and metrics to customer-facing processes

Identify processes and metrics already in place that map back to the goals you have identified. Determine new processes and reporting methods where you observe gaps, using industry best practices as your guide. Your marketing-sales funnel is a good place to start.

Prioritise processes based on objectives

Processes that are going to be of most value in supporting your overall organisational goals and opportunities should be applied to your CRM initiative.

Whether it's a sales, marketing or customer service process that needs to be put in place, you're focusing on business needs in this step, not the technology.

DEFINING PROCESSES

Goal Objectives	Metrics/KPIs	Already in Place: Yes	Already in Place: No	Customer-Facing Process	Already in Place: Yes	Already in Place: No	Priority	Include in CRM: Yes	Include in CRM: No
Improve lead to opportunity ratio from 15 percent to 25%	Total lead volume	✓		Web-to-CRM lead forms		✓	High	✓	
	Qualified lead volume		✓	Lead qualification	✓		High	✓	
	Total opportunity volume	✓		Lead nurturing	✓		High	✓	
	Opportunity/lead %	✓		Drip campaigns		✓	Medium	✓	

DOWNLOAD FORM TEMPLATE (.xlsx)

Step 2: Define Policies

Determine if the introduction of new technology or the expansion of your business requires changes to your existing policies and if any new policies need to be implemented.

Review existing policies

Map your processes from Step 1: Define Processes to policies you already have in place that cover technical, business and reporting standards. Determine which need changing and identify areas where new policies need to be applied.

Focus policies on data integrity

Policies differ from organisation to organisation but often address the same areas of concern to ensure the integrity of data in your CRM system is safeguarded.

Automate enforcement

CRM software can facilitate a number of ways to automate enforcement of your policies. Utilise this functionality to make adhering to policies automatic and as effortless as possible. This includes making sure required fields are filled in before saving, naming conventions are followed, tasks are completed in order and automating scheduled reporting.

Document and communicate

It is important to take time to document your policies and create a CRM policy manual. Incorporate the essence and the mission statement of your CRM system and what you're trying to accomplish so there is a clear understanding throughout your organisation.

With a CRM policy in place your whole organisation is working from the same usage standards and naming conventions to maintain data quality and keep your CRM system healthy.

CRM POLICIES

Policy	Policy Type Technical/Business/Reporting	Already in Place Yes	 No	Can it be Automated? Yes	 No
Inbound inquiry handling	Business - Sales	✓		✓	
Lead follow-up	Business - Sales	✓		✓	
Opportunity prioritization	Business - Sales		✓	✓	

DOWNLOAD FORM TEMPLATE (.xlsx)

Step 3: Plan Performance Metrics

Define specific performance metrics for your CRM initiative based on your objectives at the outset of the project and implement reporting to track progress.

What does success mean?

Take a close look at the challenges included in your business case that exposed the need for your CRM initiative. Then define performance metrics around these challenges to assess the success of your CRM initiative.

Link CRM success to business objectives

Use your business objectives developed in Step 1 to create performance metrics. Tracking and reporting on performance metrics will keep teams focused and support them in meeting or exceeding overall business goals.

Benchmark current performance metrics

Understand where your business is today by analysing performance metrics as they stand today and use this as a benchmark to compare future metrics against.

Report and monitor performance

There is a strong correlation between organisations that focus on reporting and the success of CRM initiatives. Once reports are developed and implemented, ensure they are regularly reviewed and essential information shared. As well as monitoring performance, reports can be used to check consistency of data entry and are essential in providing feedback and guidance to customer-facing staff.

Approach this step not just from a "is my CRM system working" perspective, but also from a "is my organisation functioning effectively and efficiently with its customer-facing activities."

CRM INITIATIVE PERFORMANCE METRICS

Performance Metric	Benchmark	Objective	Reporting Schedule
Total lead volume	3,500	3,500	Every Monday for the previous week for the first 8 weeks, then on a continuous monthly basis.
Qualified lead volume	1,500 *	2,500	
Total opportunity volume	525	875	
Opportunity/lead %	15%	25%	
	*previously not reported		

DOWNLOAD FORM TEMPLATE (.xlsx)

Step 4: Review Structure

Review your existing organisational structure to identify and determine if any changes or additions are necessary to support revised or new processes.

Review current structure

Identify if your existing organisational structure and job roles support your CRM initiative. Adjustments may need to be planned for if new processes affect day-to-day duties.

Project planning and deployment team

Whether you are doing a major refresh or re-launch of your CRM, it is key to assign a project team of stakeholders made up of a mix of managers and end users.

Who are your champions?

Formally assign at least one person from the business side (sales, marketing or customer service) with a strong focus on process and one from the technical side to oversee and maintain the system going forward.

Create CRM Health Team

During all stages of your CRM initiative - planning, deployment and maintenance - regular meetings with stakeholders and champions are pertinent to the ongoing health of your CRM.

This is a step that is often overlooked; however, it is best practice and essential to put a support system of stakeholders and champions in place right from the outset of your CRM initiative to ensure success.

CRM TEAMS

Assessment of Current Structure

Project Planning and Deployment Team

Name	Title	Name	Title

Planning and Deployment Meeting Schedule

CRM Health Team

Name	Title	Name	Title

CRM Health Team Meeting Schedule

DOWNLOAD FORM TEMPLATE (.xlsx)

Step 5: Audit Skillsets

Audit existing skillsets and plan for any new skills that are essential to support your CRM initiative and determine the process and technology training required to develop those skills.

Audit existing skillsets

Review existing skillsets within your organisation to identify gaps where training is necessary to ensure smooth implementation of new processes and technology.

Cultivate solution experts

Take advantage of CRM training programs to ensure that you have internal subject matter experts to champion ongoing CRM maintenance and help shape training and processes that are relevant to the user and your organisation.

Establish sustainable training

Take advantage of any free training options and documentation available from your CRM provider for onboarding and continuous training and tailor an internal training program built specifically around your organisational needs.

Capture CRM best practices

Create an online repository to store and share documentation and resources around training, best practices and your CRM policies so that these can be easily accessed by all staff and any time.

It is important that the business processes defined in Step 1: Define Processes are taught in relation to the technology, the combination will yield the greatest results.

SKILLSET AUDIT

Job Function	Skill	Existing		Training
		Yes	No	Internal/External
Solution Expert / Champion Specific				

DOWNLOAD FORM TEMPLATE (.xlsx)

Step 6: Create Rewards

Implement a rewards program to encourage adoption of new policies and processes and maximize the effectiveness of your CRM initiative.

Building internal awareness

Keep staff informed of progress and creatively promote your initiative. Give the project a fun code name, throw a launch party, give out awards or prizes as you reach milestones, or run a competition to name your CRM system.

Identify CRM adoption 'Hot' spots

Some policies and processes may face more resistance to adoption than others. Identify those that may cause concern prior, during and after implementation. This will help you in your development of a rewards program.

Reward positive behavior

Develop creative ways to incent users to embrace new policies and processes. This can be through compensation based usage, activities performed or peer or customer evaluation.

Continue to encourage CRM adoption

After implementation, continue to incent staff to motivate them to track their communications in the CRM system and promote consistent behavior, which will in turn build invaluable organisational knowledge of your customers.

Approach this step not just from a "is my CRM system working" perspective, but also from a "is my organisation functioning effectively and efficiently with its customer-facing activities."

Step 7: Build a Culture

Cultivate a culture in which your CRM becomes the system that is used in the organisation for all customer-facing activity to support the continued growth of your business.

Have teams hold themselves accountable for CRM usage

With multiple users and business units using the system, there is interdependency among the users and the accuracy of customer account and interaction information. As a result, the most successful implementations are those where teams hold themselves accountable to usage of the system.

Proactively groom and nurture champions

Have champions mentor peers to help "transfer" knowledge and experience to them. This is especially important to protect information, processes and valuable wisdom from being lost if staff retire or change positions.

Provide continuous training and onboarding for new employees

As part of the onboarding process CRM training is crucial for preparing new hires for success. It is equally important to provide continuous training for all staff to maintain the integrity of your CRM system and encourage use.

Keep evolving your CRM

Monitor the health of your CRM system, adding new functionality, processes, policies or training as business needs change. Periodically review steps 1-7 to make certain you are still on track for success.

Keep in mind users will look at "WIFMs" (what's in it for me?) so it is important that individuals perceive that changes will benefit them personally and that the CRM system is a valuable and vital tool for them.

Successful Organisations Drive...

- Processes
- Policies
- Performance Metrics
- Structure
- Skills
- Rewards
- Culture

The most successful CRM implementations are those where the whole organisation collectively supports the "7 Steps" to leverage the full power of their CRM system.

Next Steps

- Watch the **'[7 Steps to Enhanced CRM Performance](#)'** recorded webcast
- **[Download templates](#)** for the forms found in this e-book (.xlsx)
-

Contact Maximizer!
email: info@max.co.uk
phone: +44 (0)845 555 99 60
web: www.max.co.uk

Maximizer Software
Simply Successful **CRM**