Adapting a CRM system for your business

www.pcr-ltd.co.uk

Executive Summary

For many businesses, CRM systems have demonstrated clear and tangible benefits, by providing immediate value to the sales and customer service departments. A suitable CRM system can benefit your company in a number of ways:

- Improve Sales Team Productivity – Reduce the burden of repetitive tasks that can disrupt sales processes by streamline pricing, proposal generation, and order processing.
- Strengthen Customer Relationships – Track all activities, offers, orders and relationships associated with your accounts to ensure a timely response to customer queries.
- Enhanced Marketing Communications – Create marketing materials and campaigns quickly and effectively, and monitor their effectiveness and ROI.
- Centralising data improves accuracy and saves time – Centralise your data into one, manageable and secure system, ensuring your data is more accurate and productive.
- Reporting and Analysis – Remove the guess work from sales and marketing results, by using pre built reports and graphs within CRM.

Implementing a CRM system doesn't have to be difficult. Here are some guidelines that you can follow before you embark on CRM implementation within your company:

Develop a corporate CRM culture and engage key stakeholders

Many CRM projects fail because critical stakeholders are not involved. They need to be involved in assessing the business objectives, setting CRM strategy, issuing directives and engraining CRM usage into company culture. Key stakeholders need to be able to make financial and time commitments to ensure success. Communicate CRM initiatives to people in your company via directives, policies and training.

CRM implementation is mostly about adapting the CRM tool to fit your business and people processes. It is your business and your customers, so get involved and use external expert help to make the implementation go smoothly and to reduce risks.

Identify who will benefit from the CRM system, for example, customers, staff, suppliers, business partners, etc

Define your CRM strategy

Many people mistake implementing CRM to simply mean installing/using 'software'. In fact CRM strategy is more about identifying critical relationships between the business goals and CRM implementation strategy: business processes, people and IT tools. It is about using appropriate methods and business processes to help improve your business relationships with your customers and prospects. First, measure key metrics in your company; make comparisons with previous metrics and with competitors if possible.

Set some high-level customer relationship goals in key metrics areas such as: lowering lead to sales time, increasing numbers of customer referrals, increasing repeat business, reducing issue resolution time thus improving your small business customer service, increasing sales closure rate, and so on.

Identify and document the measurable benefits you want to achieve, identify your Key Performance Indicators (KPIs). Expect increases in business and decreases in costs. If you don't see this within a relatively short period of time then change your implementation strategy.

Define your CRM objectives and prioritise CRM requirements

Every department within any organisation has its own needs and sense of priority within the organisation. For example, Sales Managers may want to get better pipeline and forecasting capabilities, while Customer Support may want to implement a self-service knowledgebase for customers to reduce the number of support calls. Combine this with regular business problems and you can quickly lose focus of the main objective if you do not prioritise your CRM requirements. You should prioritise those areas which are key process areas or which are causing the most friction, cost and missed opportunity for the business.

Also, as CRM is based around people, you should consider social and organisational factors such as company structure, roles / hierarchy and authority, cultural differences within your organisation, politics and resistance to change. Understanding all of these more subtle points will also play a part in successful CRM implementation. Start in areas which will be easiest and which will result in the highest reward for your business and highest level of buy-in from your users. Other factors to consider are weaknesses compared with competitors; complexity of each area; and if other systems require integration.

Don't expect your CRM project to have an 'end' date either. Fact: it will never be complete because as your business grows the CRM will adapt and grow with it, perpetuating the improvement cycle. You will constantly think of new ideas to improve processes and the

beauty of a CRM system is that your CRM Partner can adapt the software to match your ideas.

Develop a CRM roadmap

Once you have the high-level vision and after you have identified and prioritized the areas which you feel will bring you the highest benefits, develop a 'roadmap', a master plan, consisting of several mini projects and subtasks that will move you toward achieving the corporate CRM goals. It is useful to identify people responsible and to identify key metrics and timelines, beginning with low risk/high reward areas, which help build momentum and buy-in from users.

Integrate your current systems

Look at the 'big picture'; determine how, where and when implementing CRM tools will integrate/replace other tools/applications/processes. A CRM Consultant will be able to assist in analysing your business processes and making recommendations on where the CRM can integrate or even replace your current systems. A CRM will eliminate the need for traditional means of reporting Sales status and activities with Word/Excel ,for example, and you will likely want to integrate/consolidate your calendaring/contacts system (e.g. Outlook)

Address your needs

CRM software is complex. It needs to be, but don't get sidetracked by the mind boggling number of features in CRM software. After determining your main business needs and priorities, use that list and determine which partner can best meet those needs. A CRM Partner can also assist in this area as they will be able to advise you which software on the market matches your business needs. For example, some CRMs are excellent on automated workflow (good for automating your business processes and reducing sales ramp time), others have strong functionality relating to quotations and invoicing.

Learn, be flexible and evolve your business

Use the CRM to log tasks, feature requests and issues and report on the status on a regular basis. Analyse usage, get feedback and implement solutions to make sure the CRM evolves with your business and customer needs. A CRM Consultant can help you by overseeing

feedback, customisation requests and ongoing training, making appropriate recommendations to make sure changing needs are addressed over time.

In summary, affordable and efficient CRM is easy and fun to implement. So get involved, get a CRM consultant to advise, take it seriously, imagine and target for the benefits of CRM, and then work hard to make it transform your business so you can reap the rewards.

About PCR

Established in 1992, PCR are a leading provider of Outsourced IT Support Services, integrated financial accounting software, Customer Relationship Management, Document Management and business applications to customers in Surrey, Sussex, Kent, London, and further afield.

As a Microsoft Silver Partner, we can customise Microsoft Dynamics CRM exactly to your requirements, either via a browser application, or embedded within Microsoft Office Outlook. CRM Online is popular with businesses of all sizes, providing quick access to the system, without the traditional IT overhead. There are no set up fees, no server infrastructure required, the system can grow with you and can be set up within 24 hours.

Contact us today to find out more. Visit www.pcr-ltd.co.uk or call 020 8681 0000.

PCR Computers Ltd
4 The Pavilions, 31-33 Brighton Road, South Croydon, Surrey CR2 6EB

Tel: +44 (0) 208 681 0000 | Fax: +44 (0) 208 681 0009
www.pcr-ltd.co.uk