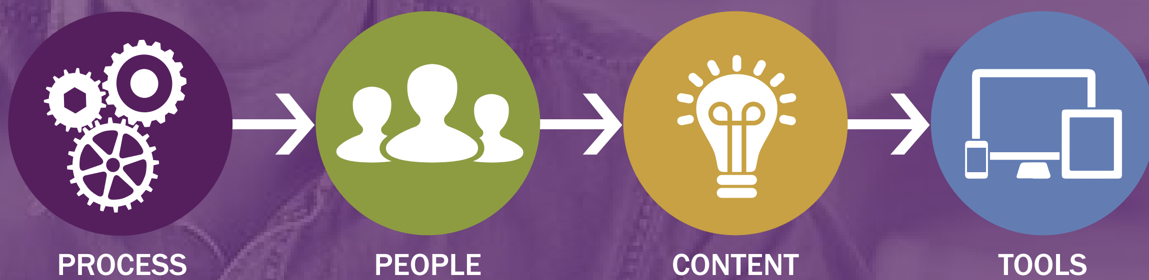
How to Deploy CRM Like the Pros

MAGENIUM® SOLUTIONS

Adoption of a Customer Relationship Management (CRM) **software platform** requires a significant culture change. It is a costly, high-stakes investment.

How do you maximize the odds of success for your CRM investment? By addressing all of the key priorities for any successful software adoption process – and addressing them in the right order:



Once you have established an optimal process, one that addresses the impact of CRM adoption on the end users and properly defines practical requirements for data capture and reporting, then software tools can be adopted to support that process. ***Too many organizations get this backwards*** – they adopt a CRM solution, and then design business processes to fit the features of the system. A flexible, adaptable sales platform should not force you into that box.

This guide is intended to help you meet the requirements for a successful CRM platform adoption, whether it is your first enterprise adoption project or only the latest.

Process

You can implement software without a predefined sales process, but if there are no sales stages in place, people can't manage their opportunities effectively. If the organization hasn't completed the process design work, you are either forced to use the functionality "out-of-the-box," or the implementation plan will have to include resources and budget to layout a process before the software is configured.

Process can be complex, and it is difficult to get it right if all levels of the sales organization are not included in the discussion, especially if it does not take into account a realistic understanding of what the day to day end-users of the system actually do. Gaps in the process design are likely to delay the configuration and increase the cost of the entire project.

A common issue with sales processes is overdesign — too much complexity, and too many process steps, for your type of product offering. Begin with objective feedback from your own sales team about whether you have the right number of stages and the right kind of toll gates between stages. Then consider input from your consultants.

BEST PRACTICE:
Design and document the sales process before selecting the software and scheduling implementation. This will ensure that the process is defined to meet the actual requirements of the business — not the generic features and functionality of the software, which may or may not be a good fit. If you are starting without a documented sales process and need help, your consultants can help, based on what they know of your business and what has worked for other, similar businesses.

Realistically, a typical sales process will include ***four to seven stages,*** depending on the number of stakeholders typically involved in the purchase decision and the size of your sales team. (A process designed for four reps will be simpler than one designed for 400 reps.)

Getting to an effective design will require commitment of time from internal subject matter experts. The end product of the process design will be a document that can be used both to secure buy-in from your people and to guide configuration of the CRM platform.

> **“Firms with formalized sales processes have 18% better revenue growth than firms that don’t.”**
>
> – Harvard Business Review

People

Your sales process is a reflection of your organizational culture. If your organization tends to generate policy and impose it top-down — and if that is working well — then CRM adoption probably should be no different. If your organization is flatter and more democratic, you will want to give greater weight to the opinions of the end-users in the process design and configuration of the software.

A CRM tool has value to the extent that the users are diligent in entering their goals and activities. Compliance often becomes an issue. Sales people tend to value the time they spend meeting with prospects and clients much more highly than the time spent entering data.

Sales people who understand the value of data in tracking progress against the organization's revenue objectives also know that the reporting in a CRM system is used to monitor their individual performance. Not everyone likes to be monitored, even if they understand why organizations need to track and measure progress. In some businesses, there is a direct correlation between sales activity (e.g., calls per day) and the volume of closed/won deals; for other companies, the connection between activity and results may be much more vague.

BEST PRACTICE:
Communicate the organization's intentions **clearly and frankly. Employees should understand that they are expected to use the new system effectively, and that this expectation comes from the top. But be open to questions from end-users about how and why adoption benefits them as individual contributors — e.g., what's in it for them.**

Provide ***adequate training*** **on all system functionality — a half hour kickoff meeting won't cut it — and understand that not everyone will come up to speed at the same rate. Companies that provide follow-up training, such as periodic "lunch and learn" sessions, sharply increase the probability of success.**

Content

The CRM system will generate critically important reporting. A consistent pattern in CRM implementations, however, is that adopting companies begin without a clear picture of the reporting they need. Companies tend to begin with minimal reporting as the end-users develop facility in the tool, and then let reporting evolve. This is unfortunate. Best practice would be to ***define reporting in as much detail as you use to define the sales process*** in advance of limitation. In fact, reporting should be a core component of process design. This will enable all stakeholders in the CRM adoption to see the return on investment quickly, and in specific, quantified terms.

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Technology

The migration of CRM solutions to cloud platforms has led many organizations to assume they can be more casual about infrastructure issues. But cloud implementation has its complexities.

Begin with authentication. Without effective configuration, an end-user may find themselves with one ID and password for the cloud, and a different ID and password at their desktop, logging into their domain. Active Directory federation between the enterprise and cloud environments can eliminate this annoying redundancy — but it is a step that many organizations neglect to take. This issue becomes even more complex with integration to other tools and data sources, such as Microsoft SharePoint, which is both an enterprise and a cloud platform, and a large sales force may need CRM integration to both.

These kinds of ***infrastructure requirements are best defined in advance*** of the initial implementation. It is much less problematic (and far less expensive) to deal with these considerations at the front end, rather

BEST PRACTICE:
Design for mobile. **A CRM adoption has to include careful analysis of the process by which users will enter data, and this must be as simple as possible. Virtually all CRM platforms now include mobile functionality. Many CRM adopters, however, have failed to account for "mobile moments" when sales reps can be capturing and using CRM data.**

than discovering and resolving them after the launch. ***Every implementation will begin with a design document*** that describes the process being automated and the tooling and configuration to address your business requirements. As a matter of best practice, that design document should include a detailed security model.

There are specific configuration steps required to take advantage of mobile functionality. Many adopters decide that initial configuration that leverages only the desktop is sufficient for the first phase. This is shortsighted. Mobile is too important in the life of a sales rep for this functionality to be relegated to a second or third CRM implementation phase. Again, the design document is critical, and it should include consideration such as remote data capture and synchronization in cases when reps frequently get beyond the reach of a mobile signal.

> **"Sales reps saw their productivity increase by 26.4% when adding social networking and mobile access to CRM applications."**
>
> – Nucleus Research

Let's Get Started

If you're about to undertake a Dynamics 365® implementation – or any Microsoft-focused adoption process – **contact a Magenium Solutions specialist** to discuss your options.

Planning for all of the contingencies we have described here can head off many of the misalignments of expectation that have plagued CRM adoptions, undermining confidence in the project and delaying the realization of ROI.

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