

10 Steps to a Guaranteed Successful CRM Implementation

**Starting With a
Great Foundation
Should Be the
Cornerstone of
Your Implementation**

By Susan Clark



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Several years ago, after looking at quite a few homes on the market, my husband and I decided to do extensive remodeling of our existing house. It is not the biggest or fanciest house on the block now, but it perfectly supports our lifestyle and has become a great place for entertaining our friends.

However, I frequently hear of people who remodel or build a house only to be disappointed with the end result. They didn't take the time to analyze their needs before the process began or some of their decisions were made because they were trying to be too cost conscious and they ended up making less than optimal decisions. They wake up every morning in a house that doesn't really suit their needs.

Don't let your CRM implementation fall into some of the same traps. The process is not so different from building a house. You don't want to come to work every morning and, over your first cup of coffee, realize that you should have taken more time to analyze or not have been so cost conscious and made less than optimal decisions.

I've been working for quite a number of years now helping clients successfully implement ACT! into their companies culture. After a while **you start to see patterns for successful implementations**. Those companies that take the time to lay the foundation always reap the rewards. They are happy when they start their systems with their morning cup of coffee.

1. Start with a picture

It seems so obvious, but it is so often overlooked. When we looked at remodeling our home, I collected pictures that helped me to develop an overall goal for the remodeling project: a house that we would be happy to retire in...easy to clean, functional, relaxing, energy efficient, etc. Figuring out your goals for ACT! are no different.

Start with **“What will a successful ACT! implementation look like...how will your company be better?”**.

Yes...yes...your salesmen will be more organized, but what do you really want? Sometimes it is hard for people to answer these questions, since they don't really know what ACT! can do. You may consider using the services of an ACT! Certified Consultant to give you an advantage...to help you understand all of the different functions that are available and how the hundreds (or perhaps thousands) of other companies they have worked with have used this popular product.

Some goals might be:

- Improved and more accurate **methods** of customer contact.
- **Consistent communications** with customers and prospects that result in higher conversion rates from prospects to customers and higher retention rates for existing customers.
- **Management tracking** of sales activities to be sure that opportunities are not falling through the cracks or to determine where deals are stalled.
- Combined, **shared database** so that if someone leaves the company, all the client information is not just in their heads (or in their own personal Rolodex).

- Or perhaps a database where each user saw only the contacts, histories, activities, and opportunities that belonged to them, while **management sees the entire database**.

Then move to **what features could support those goals**:

- Will you want to utilize the shared calendar in ACT!?
- Are you interested in implementing some drip marketing campaigns utilizing your ACT database?
- What kind of sales activity reporting will you need (if you don't plan for it now, you may not be able to get it out later).
- Do you want to hide certain fields from some users?
- Do you want to have some users on the web while they travel, or do you want to give them sync copies?
- Do you want to disable certain functions for some users?

2. Define your sales process...Map out how you do things

In an ideal business environment, everyone on staff knows how the owner of the business would like each salesperson to follow up with prospects and clients. Each sales person would use the same (or similar) process, with company approved marketing and sales letters. Unfortunately, we all get so busy running our businesses, that we many times forget to let those that work for us know our expectations for follow up.

So our next step encourages you to spend some time with your management team and key sales people to **map out the ideal processes for each area of your company**.

- What is the expected response to a sign-up from the web site?
- What is the follow-up strategy for proposals?
- What is the ideal way to keep in touch with your customers?
- How do you keep in touch with your inactive customers?

Once you have designed your sales process, it is easier to **ensure that ACT! is reinforcing that process**.

3. WIIFM

The number one reason listed for CRM failures is lack of use by the end users. In the first few steps, you were figuring out how the company would benefit from an ACT! implementation. If you want others in your organization to use ACT!, figure out what's in it for them. Look for ways that ACT! can make your staff's lives easier...so they are more likely to use it.

There are lots of ways to make things easier.

- Put your sales letters and emails into ACT! to make them easier to generate (and to ensure that company standards you decided on in step 2 are being followed).
- Customize the fax form to match your company standard.
- Make generating proposals a breeze.
- Do you require sales reports? Have ACT! automatically generate them.
- Are there forms to fill out? Have ACT! automate that function.
- Add ACT! to your PDA device or SmartPhone (have some of the power of a notebook without lugging one around).

4. Add customizations before roll out

For parts of our remodeling project we worked with professionals who could help us better utilize our existing structure. They came up with some great suggestions (from years of experience) that we would never have thought of...but have made our home so much better.

Occasionally I have clients that just want to do training and then they will figure out what fields to add. Just like in construction, this is a sure-fire way to waste your money and your sales staff's time. Don't make people go back to fill in fields. (Measure twice and cut once per our carpenter.)

ACT! ships with a pre-defined set of fields that include most of the address fields that you need with a few additional for categorization. If you have done the work in the first 3 steps, then you will already know what fields and customizations need to be added to the database.

- New fields might include (Sales Rep, Physical Address fields, E-mail preferences, Trivia, etc.)
- Add fields needed to fill out custom forms
- Add any fields or custom activity types for sales activity reporting
- Update the sales process to reflect your corporate standard
- Standardize your drop-downs to match your industry and to make it easier for you staff to enter things in ACT!
- Include "Activity Series" for standard follow-up procedures

The list can go on. This is another area where **a seasoned consultant can help you determine what customizations should be handled prior to the roll out of ACT!**. They can also keep you from falling into the next trap...

5. Don't add too many fields

ACT! is such a user-friendly database that many times companies get carried away with adding fields. Do you need your staff spending all their time filling out ACT or calling on client and prospects? **There is a fine balance between keeping important data on a client and letting well enough alone.**

Too many fields to fill in can overwhelm your staff. Keep it simple. If several departments will be using the same database, then design several layouts, so that each group can focus on only the data that they are responsible for collecting and maintaining.

6. Be sure your hardware exceeds minimum requirements

Nothing is worse than working with a software that is slow because it is running on an underpowered machine. I keep ACT!, Outlook, and Word open at all times during the day. Then as I work on other projects, I might also have open Excel, PowerPoint, a graphics program, a screen shot program, or my html editor. As in my house remodeling example, when we added more appliances we needed to upgrade the electrical. Adding new software is no different.

Regardless of the programs that your staff uses, you need to **be sure that you are updating your PCs when you update your software.** Newer software is designed to take advantage of the newer processor speeds and RAM. If your system isn't upgraded, then the new software will bog an older system down.

The minimum specs for ACT! are 600MHz (Pentium III), but a Pentium IV is highly recommended. The minimum RAM is 512MB, but if they will use more than just ACT! and Outlook, then the workstation should have 1GB of RAM.

I cannot stress enough that your staff needs to have tools that keep up with them. **Old computers with newer software can significantly slow down your staff's output.**

7. Have documented procedures

Ugh! Who wants to prepare documentation! Unfortunately what seems obvious to the designers of the database are not always obvious to others and you can't expect end-users to remember processes, keystrokes, or steps. You will **use the documentation to train the staff** (the next step). In addition, it helps with that problem of turnover and letting the new person know how your company uses ACT!?

I know it's painful and you want to get on with using ACT!, but it's important in the long run to get a few things in writing. It's not like books come with the software anymore.

Documentation doesn't need to be long, but might include...

- A few key procedures...with pictures.
 - A double-sided reference guide would be nice.
 - A screenshot with key fields described.
 - Perhaps a more involved user guide that they could use to look up "stuff."
- Might I suggest copies of The Official ACT! QuickStudy Guide sold on www.act.com (written by me) or some of the guides sold on our website.



8. Train your staff...but not just keystrokes

ACT! is so easy to use that sometimes training almost seems redundant. However, there are lots of tips and tricks that an experienced user can pass on to the staff to increase their productivity.

But training should be so much more than just about steps to complete a task. This is the perfect **time to discuss and implement the company philosophy** that you outlined in the first two steps. Show the end users how they can use ACT! to help them fulfill that philosophy. It's the perfect time to implement new policies.

9. Follow-up and train your staff again

When you are watching someone show you how to accomplish something in a new software, it seems so logical...until you get back to your desk...when you can't remember where to start (good documentation helps here). Then when you are working in the new product, you can think of so many things that didn't even cross your mind when the expert was in the room.

Consider having a one-hour refresher course (ways to be more productive, be sure your staff is getting the most from the software, etc.) about a month after the initial training. This is always a great time to review problems, discuss procedures and intentions, and to keep momentum going. If everyone is not in the same location, consider a WebEx and/or conference call.

10. Give Awards

Everyone responds to positive reinforcement. You want user buy-in? Try rewarding their behavior. Awards can range from verbal recognition to small gifts or money. More important is **where** they are handed out.

Awards should be announced in a sales or staff meeting or in the company newsletter. The awards can be funny or serious (or a combination).

- Most improved ACT! user
- Best new idea to improve business using ACT!
- Most appointments scheduled in ACT!
- Most follow-up handled through ACT!
- Highest open rate on an e-mail
- Most number of new customers from a marketing campaign
- Shortcut user champion

Any builder will tell you that the time and effort spent on the foundation is the cornerstone of your project. OK, now I'm confused...are we talking about buildings or ACT! implementations? And cornerstone what?

The Author



Susan Clark literally *wrote the book* on ACT! Software: She's the nationally known and respected author of *The Official ACT! Quick Study Guide* (now in its 7th edition) which sells on ACT!'s home page. She is currently providing workshops in several major US cities on how to implement follow-up marketing programs with ACT!

Her company, Cornerstone Solutions in Houston, TX, has one of the largest teams of ACT! Certified Consultants in the world, is one of the top ACT! resellers in the nation, and Susan founded the Houston Area ACT! Users Group.

Susan's been recognized for just about every honor an ACT! expert can receive. She is a Sage Authorized Premiere Trainer and her courseware is used by many consultants in their training classes nationwide. Susan is actually considered an ACT! Consultant's "ACT! Consultant" because Sage (ACT!'s corporate parent) hires her when they need to train and certify new ACT! consultants. She was voted onto ACT!'s Advisory Board (1 of only 9 in the world) by 400 of her peers in the ACT! community. (The Board meets with ACT!'s US president and top software developers to help guide the future of this #1 selling product.) She also facilitates the Houston Area ACT! Users Group. You can reach Susan at 713-661-5095 or clark@cornerstonesolutions.com