



Ten Common CRM Mistakes



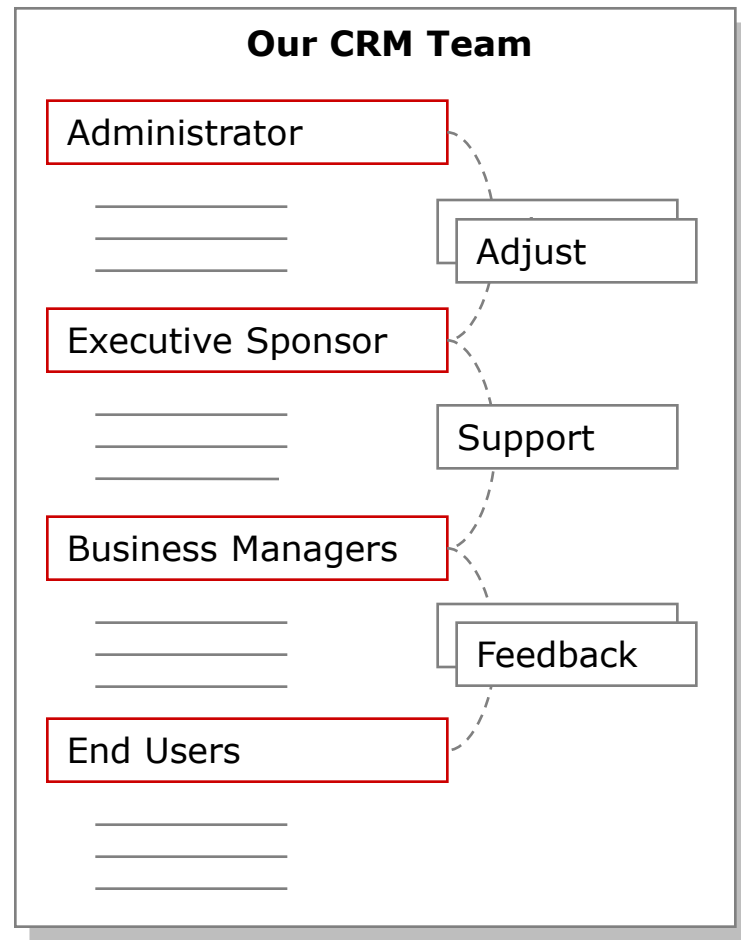
1. No Project Team

Symptoms

- A single person is assigned to customise and rollout CRM
- Limited understanding of the specific needs and interaction among business groups

Solution

- Build your project
- Gain support from a CRM partner





2. Lack of Strategic Vision

Symptoms

- We have a CRM tool but we are not sure what we want to do with it
- No understanding of the Company's business objectives and goals

Solution

- Set your project goals

Our Project Goals

1. Increased Sales



2. Better Collaboration



3. Improved Satisfaction



4. More Effective Marketing





3. No Success Metrics

Symptoms

- No clear goal for CRM efforts
- Specific objectives of the Company have not been quantified to allow performance analysis

Solution

- Set your success metrics

Our Success Metrics

1. Pipeline To Close Ratio	_____	Improve by 20%
2. Identify Lead Sources	_____	Top 5 Lead Sources
3. Improve Customer Service	_____	Reduce Calls by 30%
4. Touch Customers Regularly	_____	At Least Once a Month



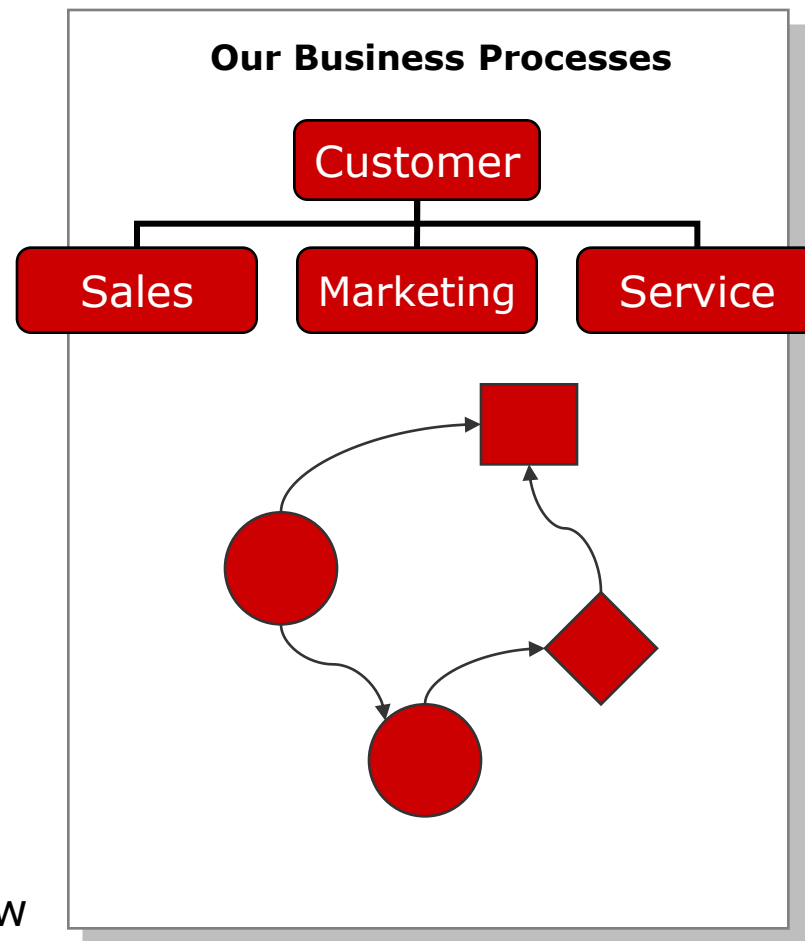
4. No Business Process Review

Symptoms

- The custom fields do not make sense to users
- Our existing sales or customer support processes are not represented in the application
- The information I need to run my reports is not included in the account, contact or opportunity information

Solution

- Complete a business process review





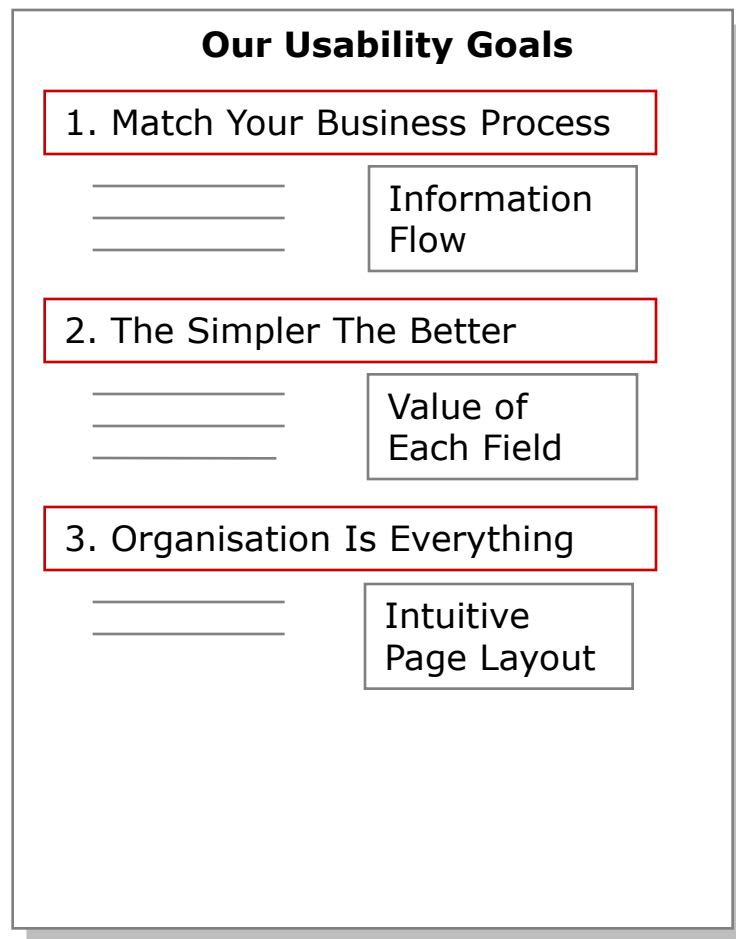
5. Complexity Inhibits Productivity

Symptoms

- We need more custom fields
- There is so much information that users cannot find what they need
- Users complain the application is cumbersome to use, it slows them down

Solution

- Focus on usability





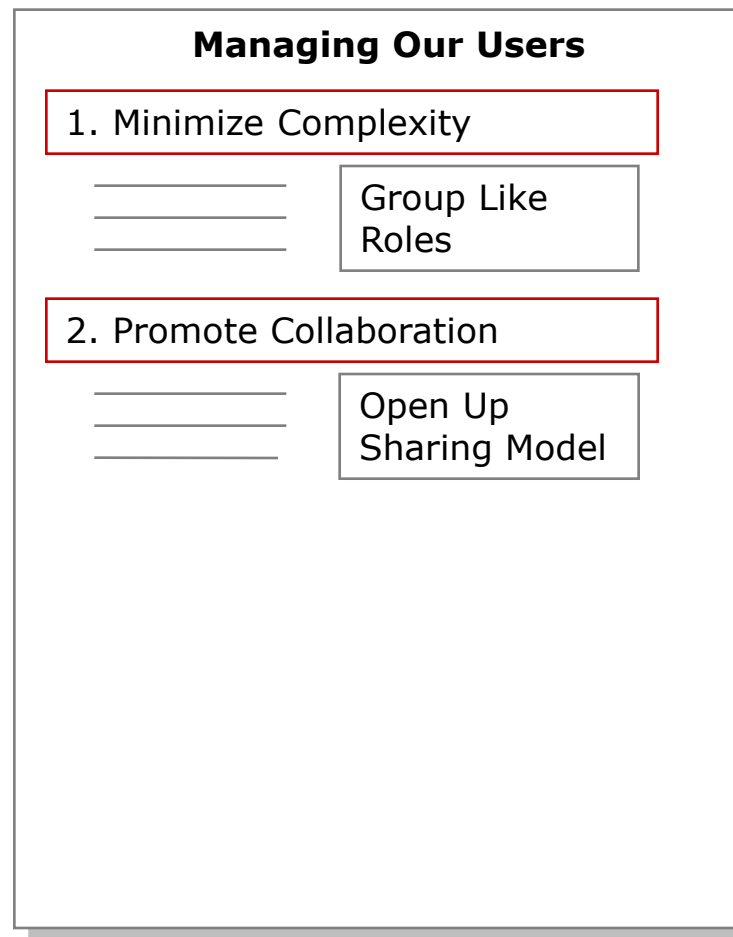
6. Cannot Easily Share and Report

Symptoms

- Users do not have access to the information they need
- Users cannot collaborate and step on each others toes
- Pipeline and Forecasting reporting is difficult

Solution

- Start with a simple and open sharing model





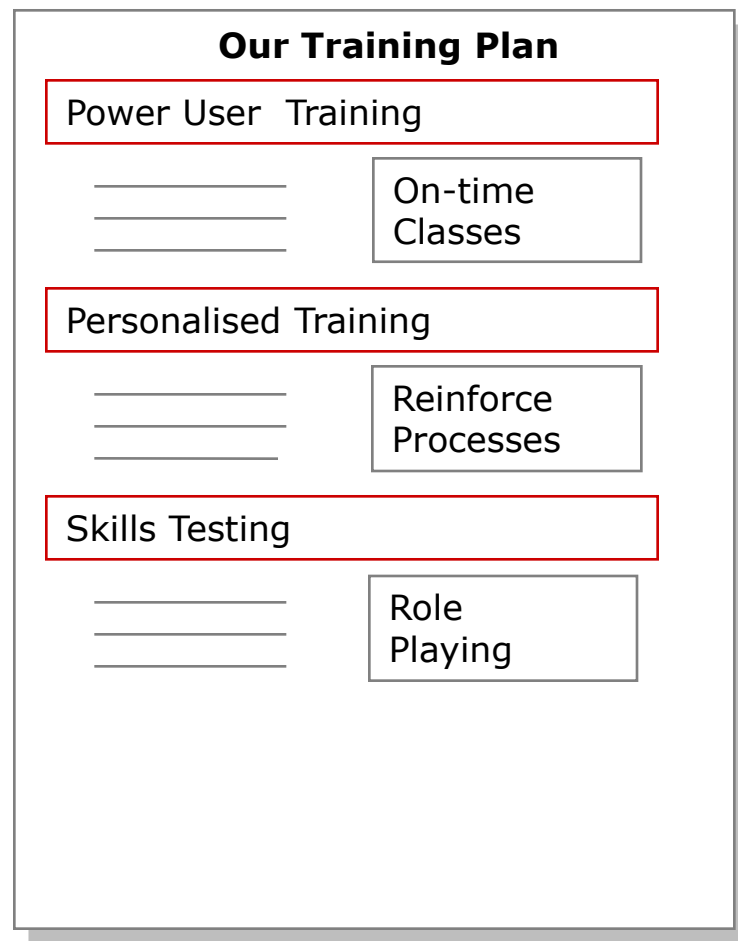
7. Inadequate Training

Symptoms

- Users cannot figure out how to use the application
- Adoption is poor
- Information is not being entered in a consistent fashion and data quality is poor
- Users do not understand our specific value proposition

Solution

- Create a training plan





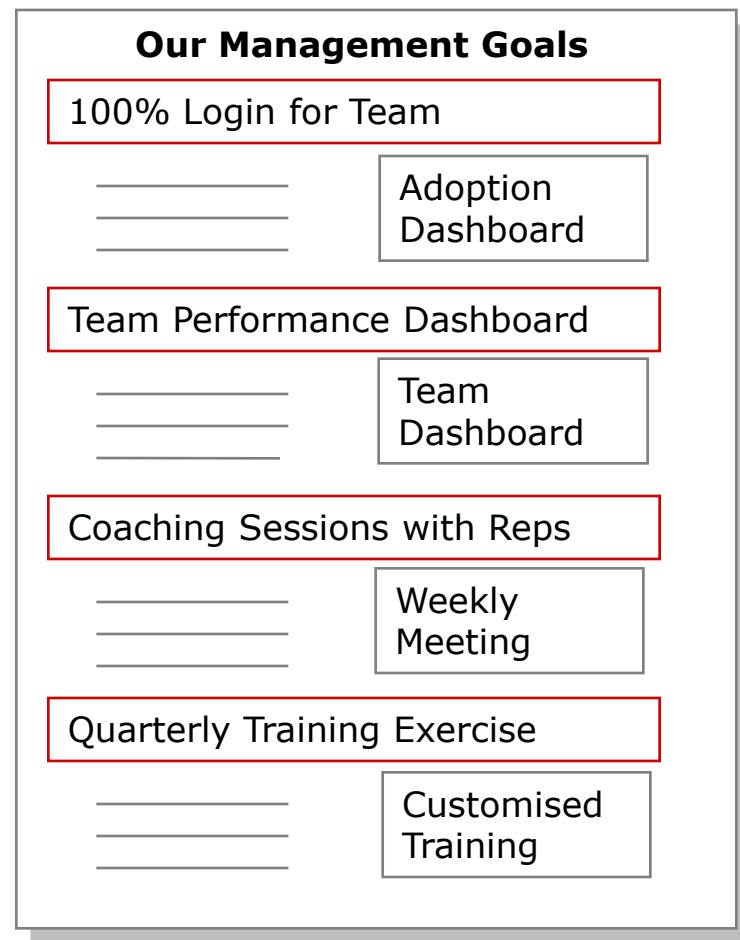
8. Not Managing to the Application

Symptoms

- User are not switching over from their old system
- Management still using legacy reporting tools
- Critical reporting metrics are consistently generated outside of the application
- Call Lists and Pipelines turned in on Excel spreadsheets

Solution

- Look for opportunities to manage to the application





9. No Change Management Process

Symptoms

- The application does not match our business process
- There a number of fields that no one uses
- Individual users have created their own fields which do not apply to anyone else

Solution

- Create a formal change management process





10. Not Leveraging Resources

Symptoms

- We are having problems 1 through 9.

Solution

- Take advantage of the online help, forums, how to articles and customer support

