

Top 10 Tips – Making Customer Relationship Management work

Supplied by: VCT



1. Ensure you understand what you need from a Customer Relationship Management system (CRM) before it is up and running. If the purchased CRM has limitations for your company it will not become a worth while investment.
2. Place financial worth on your data and the acquiring and maintenance of this. This data is where prospects and potentially customers are built. Placing a financial value on it tends to lead to greater appreciation and thus care of data fields.
3. Developing and maintaining the data stored requires an ongoing investment. Databases age rapidly so they need regular attention to remain clean and up-to-date.
4. Software is only part of the solution to data handling. The software must be institutionalised into your company providing easy to comprehend processes and database building practices.
5. Ensure the CRM make users jobs easier. A sales rep will not use an application if it adds work to their job with no real benefits to them.
6. Consider future proofing. Upgrades will be needed. Consider costs for this and re-training of staff when purchasing your CRM. Many online CRM systems offer upgrades included in the monthly fee. Looking into this at the time of implementation will save you money in the long run.
7. A CRM can place a strain on IT infrastructures because of the large amount of space needed for data and backup; consider how your company will manage this. Most online CRM providers offer data storage as standard. Consider if this will ease pressures on internal structures. Ensure all providers uphold Data Protection Standards.
8. Ongoing training will be needed. As your business and industry evolves so must your CRM and more importantly the people that use it.
9. A CRM is only as good as employees acceptance of it. If they refuse to use it, it just becomes an expense. Consider potential issues users may have with the system and address with training, feedback and adaptation.
10. Successful businesses usually have a unique selling point. Any technology or process introduced by you should support your company's differences rather than trying to change them to fit within the capabilities of the systems.

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