

CRM, or Customer Relationship Management, is one of the most talked about and influential communications tools any business has as it helps to drive audience loyalty, increase awareness and ultimately drive sales by using the latest database technology. To many people, CRM is a daunting prospect, so... Phil Callaghan – managing director of Batley based Caltech, one of the UK's leading suppliers & implementers of customer relationship management systems – outlines his Top 10 Tips on what to look out for and what to do!

1. ***KISS – ‘Keep it Small and Simple’***

CRM has to be nurtured, used, grown and developed to reap the major benefits. However, within a year most clients see a return on investment. The system can be expanded over time once the initial stage is complete.

2. ***Ensure its a business driven application***

Involve all stakeholders within your business to ensure there is a common, company-wide goal for implementing CRM. It is a cross functional solution that is used by many teams from marketing and sales to customer service and senior management, so each department needs to take responsibility for their own part of the system.

3. ***Look to the future***

Decide what is it you want your system to do – both now and in the future by thinking out of the box. Do not focus on the specifics but do think about your visionary requirements. How do you see it working for your organisation long term? A good CRM organisation will tailor the selected system to fit your evolving needs.

4. ***Setting & agreeing the correct processes***

Defining processes is more time consuming than difficult. Always think in a methodical way; “*the phone rings*” now what? How do you manage enquiries? Does each user follow the same route? What information is sent to the caller? How is the call followed up? *Are they followed up?* Think about processes for customer service, sales and marketing. Also, carefully consider what other systems you would like to be integrated with CRM, such as accountancy programs.

5. ***Choose the right system for you***

Always invite a number of CRM experts in and review their ideas and solutions. Prepare for the meetings by ensuring that you have questions about them and their systems, i.e. Have they worked with your industry before? Does the solution fit your requirements? Also ensure that you are thinking about how user friendly the system is and choose one that has been tested, pioneered and developed to get the optimum outputs.

6. ***Analyse the risk***

CRM is a big investment so make sure you are aware of the risks you are taking such as working with and trusting CRM experts as well as the system not being used properly. Your CRM specialist should have a risk planning document to ensure that they have a back up plan if there are issues.

7. ***Agree the correct reporting***

It is all very well having a system in place but to get maximum benefit you need to know how it is working through detailed reports and information breakdowns. Always ensure that you speak with your CRM specialist about the kind of reporting that you need and make sure you understand how to access them.

8. ***Integrate all your data***

Think about and discuss with your CRM partner how all your current data can be imported and used in the new system – it is what your business is built on. Also, talk to them about how you can maximise other data that you might want to incorporate. Most importantly, ensure all data is clean.

9. *Make sure there is buy-in*

Everyone has to adopt CRM for it to work. Without them, the system just won't give you the results you need. CRM is not a single silver bullet and it will only work if you put the effort in which means bringing all relevant people to the table early in its development.

10. *Review the system and reflect on what you set out to achieve*

Review the impact that CRM has had on your organisation - both internally and externally. Once the system has bedded in, set up a CRM user group to discuss ideas, problems or any issues. Being able to "nip issues in the bud" before they become too big is the key!



