The Essential Guide to CRM Basics

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What is CRM?

CRM (Customer Relationship Management) is an attitude towards people.

CRM is about your *customers*, not your *business* per se. The premise is, of course, that your business will keep the customers whose needs it satisfies. Good customer relations, therefore, are a key component of a successful company, one that business owners and management should embody in their actions as well as their words. More than that, management must foster a customer-centric attitude in their staff. This is a point we will emphasize again and again: CRM is, primarily, having the right attitude towards customers and treating them as if they are important. Just as you don't need software to manage relationships with your spouse, your family, or your friends (and if you do, you need more help than this book can offer) you don't need software to have a successful CRM strategy.

However, given the technological emphasis and bias of CRM, "Computerized Relationship Management" might be a more fitting meaning for the acronym. So how, you might ask, can you expect a computer to manage relationships when computers are unable to understand the emotions that underlie every relationship? It can't. You and your staff have to do that part. What CRM software can do is manage the data upon which your business will build better and stronger customer relationships. Even though that definition doesn't translate neatly into a standard three-letter acronym, it is that concept, in its entirety, that we explore in this book.

The Rise and Rise of CRM

To fully understand the rapid rise in popularity of CRM systems, we need to take a look at the origins and influences that shaped this multi-billion dollar industry. Customer relationships are as old as the first barter and trade exchanges. You knew your customers personally, knew their families, knew their needs and weaknesses. As trade and markets expanded through the advent of sailing ships, the variety of goods

changed, but customer relationships were still face-to-face and based on personal contact. Globalization changed the way we do business.

It could be argued that globalization began many centuries ago, but the modern, formal globalization began with the Bretton Woods conference after World War II. It was this economically sponsored but politically driven conference that gave the world institutions such as the International Monetary Fund (IMF), the World Bank, the General Agreement on Tariffs and Trade (GATT) and the World Trade Organization (WTO).

The establishment of international currency regulations and free-trade agreements opened the way for the mass movement of goods across international borders. Initially, it was only the multinational corporations who benefited – although they had to overcome problems such as advertising slogans and pay-off lines that did not translate easily and were faced with growing databases of inventory, customers and prospects that needed to be managed. Computerization helped to do this, but in the 1960s and 1970s computers were expensive and needed large numbers of staff to run them and maintain them, let alone develop new systems. This meant that filing and storage systems were manual or mechanical for all except the wealthier companies.

Help, and hindrance, was on the way in the form of rapidly developing computer technology. The 1980s produced smaller and cheaper computers and faster and cheaper PC networks. As desktop PCs and local area networks replaced mainframe terminals, multiple software systems proliferated across multiple networks, often within a single business. Each network had its own closed database. Worse still, some of the software was running on local hard drives and the data was not centralized. The solution, for the multinational corporate businesses, was to get all their data into a centralized database. In the early 1990s, this, along with the looming year 2000 (Y2K) crisis, was the cue for enterprise resource planning (ERP).

What nobody expected was that the Internet, then the domain of academics and specialist IT people, would blossom and boom in the form of the World Wide Web. It was only after the release of web browsers, such as Mosaic and Netscape Navigator that the general public began to take an interest in the Web. By 1996 it was becoming obvious to many

publicly traded companies that a Web presence was no longer an option, but a necessity.

When the dot-com bubble burst in 2001, it left telecommunication companies with excess capacity. This kept the cost of Internet connectivity low, and low-cost Internet connectivity encouraged use of the Internet by individuals, with a concomitant increase in email inquiries and online purchasing. The excess telecommunications bandwidth was a boon to small businesses as they found the way to large international markets open for a relatively small capital outlay.

It was the massive increase in Internet use and web-based sales in the 21st century that has driven the rise and rise of CRM systems. However, it is not only the large corporate businesses that can benefit from CRM; every business can derive benefits from organized and integrated systems.

The CRM Maze

You know those maps that say 'you are here'? They're a great help if you only knew where 'here' was. Then there are the maps that show you where you need to be, but they don't always show you how to get there. The best maps, of course, are those that show you where you are, where you are going and, ideally, have the occasional 'here be monsters' warning.

Well, here's your first here be monsters warning! If you're new to CRM systems, or if you have limited knowledge of them, the last place you want to start looking for information is from vendors of CRM systems. Not that either of us have anything against vendors – on the contrary, both Perry and Michael have been vendors of one sort of software system or the other – but the fact remains that vendors want to sell you something and, as such, they are not the best source of objective information.

The journey to find the right CRM software system for your organization is full of hazards, with pitfalls for the unwary and wrong turns for the misinformed. The market is saturated with CRM products, with thousands of vendors and consultants looking for the next deal, and finding the right product for your business requires more than a perfunctory search. This book will give you tips on how to avoid the pitfalls, guidance on putting the right project team together, and advice on selecting a CRM system to suit your organization.

The only place to start looking for any business software system is within your business – by specifying your requirements. However, as we have already pointed out, CRM is more than just a software system. This means that not only do you begin with mapping your business specifications; you also have to take a careful and in-depth look at the soft skills within your business. Be aware that some of your greatest difficulties could well come from your own staff.

Generally, your employees should be the people you can rely on to deliver results, but is that always the case? Think about the relationship between management and staff. Is it based on mutual trust and respect, or is it a 'what's in it for me' relationship? What have you done to ensure that your staff has the right mix of skills to do their jobs? Think about what your staff thinks of you and your business. Ask yourself how your employees feel about working for the company.

The bad news is that if you treat your staff as if you have done them a favor by giving them a job, they probably won't use the CRM system – no matter what package you choose. If your staff training program has never gone beyond on-the-job training, they are unlikely to have the required skills – no matter what package you choose.

The easiest way to establish what your staff thinks about you, your management style, or working for the company is to look around the walls of their cubicles, on personal notice boards, anywhere they might pin up or stick the tell-tale signs. If you see signs that say 'if you want loyalty, get a dog', or signs that say 'you can't fire me, slaves have to be sold' then you know you have a lot of work to do. These are the signs that tell you that the staff doesn't care a damn about the organization, because they don't believe that the organization cares a damn about them. These are the people who you will expect to support you during the installation, who you expect to help get the business through each installation and implementation crisis.

All staff in any given organization take their lead from the top. Their attitudes to each other, to the business processes, to customers and clients, are all based on their perceptions of management attitudes and behaviors. Look at this quote from *In Search of Excellence* and see how your organization matches up.

> *Treat people as adults. Treat them as partners; treat them with dignity; treat them with respect. Treat them – not capital expenditure or automation – as the primary source of productivity gains. These are the fundamental lessons from the excellent companies … if you want productivity and the financial reward that goes with it, you must treat your workers as your most important asset. (Peters and Waterman,* In Search Of Excellence*, Harper & Row, 1982)*

Now think about your customers and all the people who might become customers in the future. What makes you think your attitude towards customers, your treatment of customers, will be any different from your attitude and treatment of your employees? Employees, like customers, are also people. If you don't care about your employees, what makes you think you'll care about your customers? Your employees deal with your customers, and if employees are unhappy, all their interactions with customers, on every level, will be tinged with that unhappiness.

Sooner or later your customers will sense the unhappiness, pick up on the tensions, and begin to ask questions. When they do, it will be your staff that they talk to, not management. Unless your company has a virtual monopoly by dint of niche market or geographic location, you are going begin to lose market share. This does not mean that a CRM system will not help you, but it does mean that you start from a negative position. Until you realize that your staff and your customers are people, and not resources to be exploited, you're going to struggle to get a real return on investment, no matter what CRM software you choose.

Service Statesmanship

Service statesmanship is a term coined by Dinah Nemeroff in a 1980 study conducted for Citibank. The findings of the study are pertinent to the service ethic you need to have in place in your company if you are serious about CRM. Nemeroff says three principle themes are necessary for an effective customer service orientation. These are:

- intensive, active involvement on the part of senior management

- a remarkable people orientation

- a high intensity of measurement and feedback.

In order for CRM systems to deliver benefits, the business must be focused on, and dedicated to, customer service. CRM is not just about technology, it is about an improved service to, and relationship with, the customer. The technology is simply an enabling tool. As Jill Dyche says in *The CRM Handbook*:

> *Technology is only a small part of CRM. Most companies who undertake CRM technology selection aren't yet ready to do so. (Jill Dyche, 2001)*

Customer service should be a company priority. It should be an integral part of the mission statement. Top management must be seen to be doing whatever they can to make customer service the cornerstone of the business – including getting personally involved in resolving customer service issues. This is the best way to get staff all down the line to adopt a customer-centric attitude. Once you have that,

you are ready to undertake CRM technology selection. More importantly, you will have a far better chance of a successful CRM system installation.

People, Not Software, Solve Problems

Most people, when asked, will say that CRM is a software system – and the people who believe this include staff in companies who are installing or have installed CRM systems. This could well be one of the reasons why CRM systems have such a high failure rate. After all, believing that software will suddenly solve all your customer relationship problems is like still believing in the tooth fairy. Software does not solve problems – it simply computerizes them.

> A Pardon My Planet cartoon has a character saying, "Aargh! I hate this computer! All it helps me do is make a huge amount of mistakes in the shortest period of time. I've nicknamed it my Tequila Machine."

A basic tenet of software installation is that the software is doomed to failure if some sort of a system is not already in place. It does not matter if your system is manual, mechanical, electronic, or any combination of those. The fact remains that you have to have an existing system that works before you can computerize it.

So, what is your organization's attitude towards customers? What is the pervading culture within the organization – and we are not only referring to the sales staff, but also to technical staff, administrative staff, and more importantly, to management. If management pays more than lip service to customer service, employees will soon get the message about where their priorities lie.

> *In too many companies, the customer has become a bloody nuisance whose unpredictable behavior damages carefully made strategic plans, whose activities mess up computer operations, and who stubbornly insists that purchased products should work. (Lewis H Young,* Views on Management, *1980)*

Thomas J Peters and Robert H Waterman, authors of *In Search of Excellence*, refer to the Lewis Young quote. Then, they go on to say:

> *That a business ought to be close to its customers seems a benign enough message. So the question arises, why does … this need to be*

written at all? The answer is that, despite all the lip service given to the market orientation these days, Lew Young and others are right: the customer is either ignored or considered a bloody nuisance. (Peters and Waterman, 1982)

It would seem that little has changed in the last 30 years, except that customers are now more demanding, have less loyalty and, courtesy of the Internet, have greater mobility. To counteract waning loyalty levels and increased customer churn, some companies have taken to offering loyalty programs rather than making a real effort to retain customers. However, loyalty is like trust; it cannot be bought: it has to be earned.

If you want customer loyalty, you have to treat your customers as if they really matter. You have to care for them and cater to their needs. Successful businesses have understood this for centuries. The research on which *In Search of Excellence* was based showed that:

… the excellent companies were, above all, brilliant on the basics. Tools didn't substitute for thinking. Intellect didn't overpower wisdom. Analysis didn't impede action. Rather, these companies worked hard to keep things simple in a complex world. … They insisted on top quality. They fawned on their customers. They listened to their employees and treated them like adults. (Peters and Waterman, 1982)

The key sentence, in a paragraph full of important sentences, is "*They fawned on their customers*." Thomas Watson Sr., CEO and President of IBM until 1956, was a man who had strong views about customer service. An anecdote about him tells of a meeting of sales managers with Watson Sr. to assess customer problems. On a table in the room were piles of papers, each pile categorizing problems by source, such as manufacturing problems or engineering problems. Watson walked to the table and with a sweep of his arm, sent papers flying all over the room. Turning to his audience he said, 'There aren't any categories of problems here. There's just one problem. Some of us aren't paying enough attention to our customers.' Then he walked out of the room, leaving twenty sales managers wondering whether or not they still had jobs.

CRM Failure Rates

The number of CRM system installations that are regarded as failures is far too high. Depending on whose statistics you read, failure rates for CRM systems are somewhere between 50% and 80%. If motor vehicles had those sorts of failure rates we'd have carnage on the roads and dysfunctional transportation systems. We would also have an outraged public demanding that something be done to improve reliability.

Of course, before we swallow those statistics as damning evidence of unsuitable products and shoddy installation, we would need to know how failure is defined. What, in terms of CRM, constitutes a failed system? It is quite probable that you would get different answers from CRM vendors and CRM users.

In the *CRM Survival Guide*, Scott Gingrich says the biggest reason for the huge failure rate with CRM projects is ignorance. This is an astounding statement in that it implies, on the surface, that either the purchaser and user of CRM systems is ignorant, or the vendor of CRM systems is ignorant. In fact, what Gingrich goes on to clarify is that both are ignorant. This is a harsh judgment, but there is an element of truth in it – particularly in light of the number of people who believe CRM starts and ends with software.

Perhaps the failure is not a result of ignorance so much as it is a failure to communicate. Never before in the recorded history of humankind have we had such sophisticated communications systems. Despite that, or perhaps because of that, we seem to have lost the ability to communicate with each other as people.

As a purchaser of a CRM system, the only way to avoid being labeled as ignorant, or as being the cause of your CRM system failing, is to make sure you know what it is that you want, and to know how you are going to achieve your goal. As a CRM system vendor, the only way to avoid being labeled as ignorant is to listen to what your potential customers are asking for.

If CRM vendors were to apply the core philosophy of CRM systems to their own businesses, their systems would have a much higher success rate than what is currently achieved.

> *Think about your own interactions with customers. Is there something they've been asking you to fix, but you just haven't been able to*

figure out how? Sit down with the smartest people on your team, and come up with a solution. Get it done. Then, go back to every single customer who has ever mentioned it – and even those who didn't – and let them know that you figured out how to solve the problem. Doing this will do more good for your sales than any amount of marketing or selling. People are surprisingly forgiving, and will send as much business your way as they can, if you demonstrate a willingness to care. (Kristin Zhivago, 2008)

IBM became a legend because of their customer service ethic, and they did not have CRM software to help them. The driving force was management attitude. Hugely successful organizations such as MacDonald's and Starbucks did not require CRM software to tell them the secret of good customer relationships. They knew that a warm smile and good service would keep the customers coming back. And they knew it because management lived and breathed customer service.

This does not mean that you do not need a CRM system. It means that having a customer-centered service ethic is vital to the success of any CRM system. Nor does it mean that you should not consider CRM as a business option. If you have sales and leads from a website, take telephone orders and sell over the counter to walk-in customers, you need a way to collate all your sales data. If you have leads coming in from multiple marketing methods, it makes sense to establish which marketing effort is giving you the best returns on marketing spend

Justifying CRM

Justifying CRM for your business is more than just saying, 'All of our competitors are installing/have installed CRM so we have to as well – or we risk being left behind'. Fear might be a good motivating factor, but of itself it is not a justification. Rather allow your concern of being last-one-in to be replaced by the satisfaction of knowing you will benefit from a more stable product, a more mature market.

Begin with defining, and re-examining, your business procedures. These procedures are the framework on which your business is built – the processes and actions that have to happen for your business to run, and run smoothly. We look at this in greater detail in *The Essential Guide to Articulating CRM Requirements*, but start thinking about it now. Essentially, you are going to specify who does what to make the business run, what documents are generated. Look at document flow and identify bottlenecks. In the process, look at which areas and operations in the business might be slicker, more cost effective, with a CRM system.

Next, define what you expect from a CRM system. Be specific and, where possible, quantify your expectations. Defining what you expect from the system should not be difficult if you have thought about CRM in any depth. If you have not done this, now is a good time to start. To help you get started, here are seven customer management goals that were used in a survey conducted by Forrester Research Inc. in 2009. Rank them in the order that you think most important in terms of your current CRM strategy:

Customer management goals	Rank
Attract new customers	
Retain current customers; improve customer loyalty	
Improve the customer experience	
Offer new products/services	
Sell more of your current products/services to existing customers	

Improve the profitability of customers

Reduce the cost of marketing, selling, and serving
customers

An interesting aspect of the results of the survey done by Forrester is how different the priorities were for B2B companies as opposed to B2C companies. For example, the B2C companies put the greatest emphasis on retaining existing customers and improving the customer experience. Given the higher costs of finding new customers and the increased profit that can be achieved by enhancing the customer experience, this approach makes a lot of business sense. The B2B companies, however, thought that the important aspects were attracting new customers followed by retaining current customers. (See the graph on the following page.)
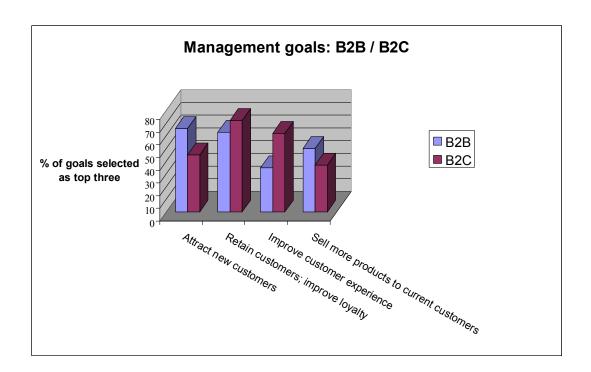
The breakdown of the top three choices for the B2C companies were:

1. Retain current customers; improve customer loyalty (72% of respondents)

2. Improve the customer experience (62%)

3. Attract new customers (45%).

The breakdown of the top three choices for the B2B companies were:

1. Attract new customers (66% of respondents)

2. Retain current customers; improve customer loyalty (63%)

3. Sell more current products/services to existing customers (50%).

The differences in emphasis between B2C and B2B companies continued further into the survey. The next most important goal for B2C companies was to reduce the cost of marketing, selling, and serving customers, again a decision that makes good business sense. For B2B companies though, this was the least important aspect of all the seven goals. This difference in approach gave us some food for thought.

Management goals: B2B / B2C

% of goals selected as top three

B2B
B2C

Attract new customers
Retain customers; improve loyalty
Improve customer experience
Sell more products to current customers

Difference in top three goals selected by B2B companies and B2C companies

(Source: February 2009 Global Forrester/CustomerThink Customer Management Technologies Value Online Survey)

What was interesting about the results of this survey was more than just the difference in approach between B2C and B2B companies. It was also the apparent shift in priorities regarding customer loyalty. A 2005 survey found far fewer business leaders caring about customer loyalty.

> *Although many business leaders pay lip service to the importance of loyalty, a CRMGuru survey found that when it comes to investing money in this area, 40% prioritized acquiring new customers, while only 22% placed priority on retaining old ones. (Thompson, 2005)*

We say 'apparent shift' because it is possible that business leaders are still only paying lip service to customer loyalty, and that when it comes to spending money, the priority is still on acquiring new customers. This, however, should not be the focus of CRM systems. By all means, prospect for new customers, but before you make this the primary focus, or even one of the focus points, make sure you have the infrastructure in place to adequately service these customers. Not doing so

means that you run the risk of losing customers as fast as you find new ones. It is a bit like baboons going through a corn field.

This analogy needs a bit of explanation for those who have never seen a troop of baboons moving through a corn field. The results are devastating for the farmer because when a baboon sees an ear of corn, it breaks it off and places it under one arm. When the baboon sees another ear of corn, it breaks it off and places the corn under its arm, losing the first ear of corn in the process. The baboon reaches the other side of the corn field with only one ear of corn, but having picked dozens of ears. Multiply this waste by the number of baboons in the troop and you get an idea of what sort of damage they leave behind them.

Your customers are not ears of corn to be put through any sort of process. They are people, and they are also the life blood of your business. Besides, finding new customers is more costly than keeping existing customers happy. This cost is far greater than most people realize; firstly, the direct cost of finding new customers is at least five times greater than it is for retaining existing customers, and secondly, you need to consider the cost of the loss of profit you would have earned had you kept all of your customers happy.

In *The Loyalty Effect: The Hidden Force Behind Growth, Profits and Lasting Value*, Frederick F. Reichheld showed that:

> *… making loyalists out of just 5% more customers would lead, on average, to an increase in profit per customer of between 25% and 100%. Reichheld's analysis showed that the cost of acquiring new customers was five times the cost of servicing established ones. The implication is that managers who depend on all manner of snazzy products and flashy ad campaigns to lure new buyers will always be playing catch-up with companies that concentrate on keeping established customers happy. Ever since, marketers have stopped looking for satisfied customers and begun focusing on loyal ones. But how does a company forecast who will be loyal and who won't? (Gallup Management Journal, 2001)*

Equally important, but apparently ignored by many analysts, is how to turn a satisfied customer into a loyal customer. There is no trick involved in this. On the contrary, it is rather simple; treat your customers as if they are people you like.

Bob Thornton of CRMGuru cites *Customers Are People: The Human Touch*, by Jon McKean:

> *… in competitive markets, where customers have a choice between similar products and pricing, 'Seventy per cent of customer decision-making is based on how customers are treated.' Yet, paradoxically, McKean goes on to say that his research finds, 'Over 80 per cent of customer initiatives are focused on how to sell better through matching products to customers, rather than investing more resources in treating customers better.' (Bob Thornton, 2004).*

Did you do a double take when you read that quote? We did, because it implies that there is a disconnect between what customers are saying and thinking and what business management is doing. Either Jon McKean misinterpreted his data and Bob Thornton misread McKean's findings, or business management still ignores what customers say.

We find this attitude in business owners and managers questionable. We also question why Forrester Inc. included *improving the profitability of customers* as a management goal in their 2009 survey. Customers are not production lines, or automatons, or agricultural land that you can tweak to improve profitability. Customers are people.

If we were to select our top three management goals from the list provided by Forrester Inc. in their survey, they would be, in order of importance:

1. Improve the customer experience

2. Retain current customers and improve customer loyalty

3. New products or services.

These would be the cornerstones for our strategy to run a successful business. Our reasoning for these choices is that:

1. A natural consequence of improving the customer experience would be to retain current customers.

2. The combination of improved customer loyalty and improved experience would attract new customers.

3. Improved customer experience and improved customer loyalty would sell more products/services to existing customers, thus fulfilling another of the management goals listed.

4. Offering new products or services would support attracting new customers and selling more products.

5. Thus, the three goals we focus on would, by their nature, provide gains and benefits to the business across all of the listed goals.

Of course, your choices might differ in emphasis, or be completely different and based on different reasoning. What is important is that you give the matter some serious thought and, where possible, quantify your expectations, put values to your goals. This is the only way you will be able to measure whether you have met your goals.

Keep Your Customers Happy

Keep in mind that installing CRM is as much about keeping your customers happy as it is about increasing sales, improving productivity and reducing waste. Without a strong customer service ethic running through the entire company, your CRM system is never going to yield the results you want.

The last thing you want to do is to lose customers – particularly when times are tight. Yet it happens all the time to a lot of companies. Kristin Zhivago says there is only one reason customers leave.

> *In every situation, for every type of product or service, in all the thousands of customer interviews I've conducted, it's obvious that there is really only one reason why customers leave. The reason the customers give is that the business stopped caring about them. (Kristin Zhivago, 2008)*

Does that sound too simple? Look at these statistics on why customers leave. Incidentally, these statistics have been doing the rounds for decades, initially as photocopies, more recently via email. These figures may be based on urban legend with little or no research to back them up, but they make sense and are generally accepted as being accurate.

- 1% of customers stop doing business with you because they die.

- 3% stop doing business with you because they move to another town.

- 5% make a new friend in the same industry and do business with their friend.

- 9% defect to a competitor because of price.

- 14% leave because of dissatisfaction with the product.

- 68% leave because of an attitude of indifference to their concerns. This could be indifference by you or your employees, it doesn't really matter. The bottom line is that you stopped caring about the customer.

Howard Feiertag and John Hogan quote these figures in their book on customer relations in the hotel industry, *Lessons from the Field*. Even if you think the 68% who leave because of indifference is too high, there is still significant evidence that points to a high level of customer dissatisfaction with service levels, whether as a result of indifference or bad attitude, as this quote from CRM Today shows:

> *A 2005 Accenture study found that 49% of people surveyed said that poor service led them to change providers in at least one industry. Francine Huff, (CRM Today, 2005)*

Your business may have a slick marketing campaign that builds brand awareness and attracts enquiries. You may have an excellent sales team who are bringing in a constant stream of new customers while servicing existing customers. However good your sales and marketing teams are, they can be undermined by technical and administrative staff that have poor people skills. Your admin staff might be abrasive and unhelpful; your technical staff might be patronizing or rude. Whatever their strengths in their area of expertise, they could well have shortcomings when it comes to dealing with customers, and it could be costing you repeat business.

> *While initial interactions determine whether customers do business with a company, subsequent interactions determine whether they will stay. For some businesses, many customers have more contact with technical, service and support people than with the salesperson from whom they bought a product or service. (Francine Huff,* The ABCs of Choosing a CRM System*, 2007)*

We all know from personal experience how quick people are to moan about poor service or a bad shopping experience. On average, dissatisfied customers will tell eight to ten other people about their bad experience. A satisfied customer will tell only two or three people about their experience. As a business, you need to ensure that the face you present to customers is helpful, friendly, caring, willing.

How would you know if your business was losing customers? You might notice a drop in sales revenue and profit, but only if you were losing customers faster than you were replacing them. If you did notice that something was not right, how long would it take you to identify the source of the problem?

These are questions that a good CRM system could help answer and could well form a solid argument to help you justify a CRM system. This is what Geoff Ables refers to when he asks:

> *If a company lost 10% of its inventory, it would react quickly. But if it lost 10% of its customers … would it even notice? (Geoff Ables, 2004)*

In an article for Vendorguru.com, Judith Sandall quotes the *Harvard Business Review*:

> *Some companies can boost profits by almost 100% by retaining 5% more of their customers. (Judith Sandall, 2006)*

Keeping more of your existing customers must remain one of your prime CRM goals. Anything less is more costly and, therefore, more difficult to justify. How any business can ignore the benefits of customer retention in their rush to increase market share doesn't make sense. Some advice on this comes from Jim Barnes, author of *Secrets of Customer Relationship Management: It's All About How You Make Them Feel*.

> *Value is created every time a customer is made to feel welcome, important and valued. (Jim Barnes, 2000)*

Knowing and understanding why customers leave is important. If possible, get feedback from customers who leave. Ask them directly, or ask your sales people to find out why you didn't get the last order. Did a competing company really offer something special in terms of price, product or service, or was it an employee within your organization who was indifferent to the customer's needs?

Quantify Your Expectations

Once you have established what your goals and expectations are for a CRM system, you need to quantify them. Let us say, for example, your primary goal is to reduce customer churn by 5%. As we have seen, this is a good choice for at least two reasons. First, it is good in that the expectation is not too high to achieve, and retaining 5% more of your existing customers will have a marked impact on both your turnover and your profit. Second, it is good because by improving customer loyalty you lower your cost of doing business. This is not the time to work out just how you will achieve the reduction in customer churn; you are merely putting values to your expectations.

The importance of this exercise should not be underestimated. One of the best measures of the success of your CRM system will be whether it meets your expectations, and the only way to know if that happens is if you have a specific benchmark against which to measure success. The results of this exercise will also come in handy when you start to specify your CRM system as it will clarify your requirements for the system.

If you have not made a list of your goals and expectations for your CRM system, then this is the time to put them in writing. Ideally, you already have a list, either drawn up before you started reading this book, or drawn up while you have been reading it. If you have already listed what you expect to achieve with your CRM system, this is a good time to review those expectations

Get Complete Staff Buy-in

To meet your expectations, however reasonable and conservative they might be, you will have to have the complete cooperation of your entire staff. Note that this is not just the sales and marketing people. It is everybody in the company, from senior management and executives down to junior clerks. All employees should feel that the CRM solution helps the company, makes their job easier, improves their performance and enhances their earnings potential. To achieve this level of motivation and enthusiasm among your staff is never easy, but here are some suggestions to help make it happen.

One method to ensure employee buy-in requires a highly visible adoption of the system by management. If the staff see and hear that management, from top executives to line managers, regularly and consistently sing the praises of the system, they will soon follow suit. Be aware though, that the corollary is that it is almost impossible to get staff to believe the system works, or is worth using, if management does not support it.

Another method to get staff support is to create a belief in the benefits of the CRM system – and the best way to do this is to involve the people who will use the system in the planning and selection process. This does not mean that all the staff have to be involved in the planning – that is a recipe for chaos. After all, a business is not a democracy and should not be run as if it is. What is best for this situation is a small task force, a team with a single specific goal and the authority to make decisions relating to that goal. What you need is an ad hoc task force.

One of the reasons for the early successes of both NASA and the Polaris program was the ad hoc task force. This was a small team brought together for a specific purpose and disbanded when the task was done. Unfortunately, by the 1970s the ad hoc task force had become a paper-pushing coordinating committee. It was stodgy, formal, rule-driven and institutionalized. Fortunately, the problems had been identified in the early 1970s and businesses today can reap benefits from the lessons learned.

> *Both Warren Bennis in The Temporary Society and Alvin Toffler in Future Shock identified the need for adhocracy as a way of corporate life. In rapidly changing times, they argued, the bureaucracy is not enough. By 'the bureaucracy', they mean the formal organization*

> *structure … established to deal with the routine, day-in, day-out items of business – sales, manufacturing, and so on. By 'the adhocracy', they mean organizational mechanisms that deal with all the new issues that either fall between bureaucratic cracks or span so many levels of the bureaucracy that it's not clear who should do what; consequently, nobody does anything. (Peters and Waterman, 1982)*

Ad hoc is a Latin term that means 'for the purpose'. Adding the Greek suffix -cracy, which means 'rule of, or ruling body of' produces a word meaning 'the ruling body for the purpose'. Robert H. Waterman, Jr. defined adhocracy as:

> *Any form of organization that cuts across normal bureaucratic lines to capture opportunities, solve problems, and get results. (Waterman, 1990)*

Waterman's definition says precisely what an effective team should do. However, to exploit opportunities, solve problems and get results, the ad hoc task force has some basic requirements.

- It should be small – usually less than ten members.

- The seniority of task force members, and the level at which they report, will depend on the importance of the project and the problems they encounter.

- Whatever the reporting level and seniority of members, it is a vital requirement that the task force is empowered to enforce their recommendations and make them stick.

- The task force is there to find solutions and solve problems, not generate lengthy reports.

- Membership is voluntary, and is in addition to the usual responsibilities of the members.

This last aspect is a key component for the task force. The members of the task force will get involved because they want to be involved and be part of the team, or because they are not convinced that the CRM system is necessary, but are willing to investigate the possibilities. These are ideal members, because when they become converts to CRM, their word will carry extra weight for two reasons: firstly,

they were not appointed – they volunteered; secondly, any misgivings or doubts they had at the beginning will give a later pro-CRM stance greater credibility.

An ad hoc task force does not require a formal mandate. A task force, by its very nature, is an informal process with a brief and informal term of reference. The life of a task force is short, measured in months rather than years.

A quick look at one extreme example shows how short-lived a task force might be. An executive at Digital Equipment Corporation tells a story about a time when he and six other executives formed a task force to reorganize the national sales force. He was leaving that night, a Thursday, for a meeting with the other members of the task force. He expected to be back on the Monday night and would announce the changes to the sales force on the Tuesday. The first phase of the implementation, he said, would be in place about a week or so later.

While you should not rush your CRM process as fast as that, this is not something to spend a long time over, having meetings about meetings, disputing the exact wording of one paragraph for an unnecessary report. Get it started and get it done.

Ideally, the task force should include representatives from all the departments that will be affected by the CRM system. According to Robert H. Waterman, Jr. in his book *Autocracy: The Power to Change*:

> *Teams should be big enough to represent all parts of the bureaucracy that will be affected by their work, yet small enough to get the job done efficiently. (Waterman, 1990.)*

Financial Justification for CRM

Motivating your CRM system financially is, in many instances, a case of making the return on investment look attractive. One formula that we came across for calculating ROI is:

ROI = R + C + P + I - CRM costs

In this formula:

- R is change in revenue

- C is change in the cost of doing business

- P is change in productivity

- I is change in intangibles

- CRM costs are the total costs accrued over the life of the project.

Being able to measure increased revenues or profit is simple because your accounting system, or financial statements, should provide an established base line against which to measure improvement. But how do you measure the ROI of greater customer loyalty, or increased customer satisfaction without something to compare them against? This can be tricky, because you have to first establish the current levels of customer loyalty and customer satisfaction. And unless you have existing data that you can use, this part of the exercise is based on thumb sucks and guesswork.

Lifetime Value

Another method of calculating ROI is based on the lifetime value (LV) for each expected new customer and each existing customer whose business you will retain. ROI is the sum of lifetime values for all the customers minus cost of the CRM system. Of course, each customer has unique purchasing patterns and behavior. The business cycle varies for different situations, meaning that there is no single formula for these calculations. The calculation shown here is a generic formula that can be used as the basis of a calculation of the lifetime value of a customer.

LV= average sale value x %GP x PF x time period where:

- LV is the lifetime value for the customer

- Average sale value is the average value of sales per customer

- %GP is the percentage gross profit per average sale value for the customer

- PF is the purchase frequency for the customer

- Time period is the length of time they will remain a customer.

These calculations are tricky because the values for each customer will differ, to say nothing of the difficulty you will face if any of this information is not available from

your present systems. If you only have a few customers or a few whose purchase history you track, the calculations are not too tiresome. But if you have hundreds, it represents a substantial amount of work.

CRM System Costs

When you calculate the cost of the CRM system, be sure to include all costs. For example:

- Hardware purchases and/or upgrades

- Software purchases

- Training costs for your staff, including travel and accommodation

- Implementation and customization fees, including consulting fees

- Cost of software upgrades and/or annual maintenance.

Thus, ROI = Total LV for the life of the system - CRM system costs.

As soon as you stop to think about these calculations you can begin poking holes in them, finding fault with aspects that are not accurate or not included. For example, we would expect to be taken to task for not using a net present value calculation to accrue CRM costs, excluding annual fees, over the life of the system.

Another aspect to consider is that these calculations are all based on assumptions, and one of the assumptions is that no additional resources will be required to service the ongoing relationship. So, unless you are an accountant, or have money to spare to pay someone to do all the necessary calculations, forget ROI as a justification.

Before we leave the subject of justifying your CRM, consider these questions posed by Geoff Ables, in a 2004 paper.

> *Quick, how many customer contacts do you have every month through each channel (direct mail, phone order, on-site, online, etc.)? How much does it cost to supply an order through each channel? Which channel is most profitable? How much unused volume do you have in each channel? How much revenue can you drive through each channel? Can you integrate your channels so that you are touching*

> *your customer through all the methods you have at your disposal and creating a 360-degree experience? (Geoff Ables, 2004.)*

If you cannot answer any of these questions, don't worry; you are in the same position as most companies without any sort of CRM system. The importance of knowing the answers to at least some of these questions is another justification for your CRM system.

As with any project, you need someone senior in the organization to champion your cause. This person has to be someone with executive authority within the business as they, effectively, become the project sponsor. This is generally a separate role from that of project manager although, in a small company and for a small project, the same person could take on both roles. It may be you who fills that role, but you need to carefully consider what is involved before you take on any specific role. If you do not want to be involved with the nitty-gritty of the installation as the project manager, and you have the necessary authority to promote the project internally and externally, set yourself up as the project sponsor. The roles of project sponsor and project manager are discussed more fully under key appointments in *The Essential Guide to Articulating CRM Requirements*.

The Common Mistakes

> *Upset happens in all sorts of things. One way it happens is through a feeling of being under acute pressure. Another is through a feeling of unreasonable strain. A third is through a feeling of surprise at the unexpected. (Miyamoto Musashi,* The Book of Five Rings*)*

A fourth cause of upset, had CRM been around when Musashi wrote, would be the common mistakes so many businesses make with CRM selection and implementation. Once you begin the CRM journey, you will frequently feel acute pressure and unreasonable strain. And all too often you will be surprised by the unexpected.

The failure rate of CRM is probably higher than it is for any other type of software system – with the possible exception of enterprise resource planning. So, what should a small business do if they want to implement a CRM solution? What are the common mistakes and how do you avoid them? Well, first of all, you are not ready for a CRM system if any of the following are true:

- You believe that a software application is the entire answer to your CRM question.

- You are being stampeded into CRM by an over-excited sales and marketing manager, or by something you read, or heard in a supermarket checkout queue.

- You believe your staff will use the system, simply because you tell them to.

- You think choosing and installing a CRM system is not much more difficult than selecting and installing off-the-shelf software for your home PC.

The aim of this chapter is to prevent your system becoming another statistic in the CRM graveyard. It sets out the common mistakes and suggests ways to avoid them. Most of the ways to avoid the common mistakes relate to four specific areas:

- Having a customer oriented culture and an environment that supports and rewards customer service

- Insisting on careful, detailed plans and system specifications

- Getting your employees fully behind the system

- Selecting the right product and vendor

A CRM system is going to affect all aspects of your business, all departments, all employees. Most people are uncomfortable with change, so to help them cope with the changes, the CRM process has to be carefully managed.

CRM is a Four-letter Word

Insanity is doing the same thing over and over again but expecting different results. This quote has been attributed to Benjamin Franklin, Mark Twain, Albert Einstein and an old Chinese proverb. Wherever it comes from, it remains pertinent to many aspects of life, and particularly to business systems. When an organization decides to install a new system, it makes sense to examine existing procedures to see if they are still relevant. It is pointless to install CRM software if the organization does not examine how procedures currently relate to customers and look for areas that will benefit from being changed.

You will more than likely have to make changes to business processes to ensure a successful CRM installation. In addition, expect changes to:

- organizational structures

- customer information databases

- measurement systems

- and, of course, the customer experience.

Technology, in the form of the hardware and software application, is important to help automate the process. But it is not, by any stretch of the imagination, all there is to 'doing' CRM. Without the strategy for change in place, it is not really CRM and will probably fail within 12 months – if you get it up at all.

The first pitfall – same old business practices

A common mistake is for a company to buy a CRM application but not change how they interact with their customers. If the software enables faster, better informed, more meaningful customer contacts, why keep using your old methods? Do you really want to speed up the process of alienating customers?

An article called "Only excellence matters for successful CRM," written by Stuart Lauchlan and published on computerweekly.com, quotes Greg Gianforte, CEO of RightNow Technologies:

> *CRM is four-letter word. Everyone has had a failed CRM project. If you just apply traditional CRM all you're going to do is speed up your internal processes and annoy your customers more quickly. (Greg Gianforte, 2010)*

CRM is, primarily, about the customer. Never lose sight of that. If your approach is product-focused, or driven by a need for management reports and controls as opposed to customer-centric, it cannot work. You have to ensure that the technology does not detract from the purpose of using the software – which is to improve the customer experience.

> *The key is to create a culture of information sharing in order to improve the customer experience. No matter what size the company, everyone cares about improving the customer experience. (Sheryl Kingstone)*

The best way to ensure organization-wide adoption of CRM as a tool, is to instill a culture of customer-oriented service from as early as possible.

The second pitfall – flawed use

The next major pitfall has been called 'flawed use'. Similar to, and related to the problem of not changing business processes, it is the belief that buying and using a CRM application is the same as 'doing' CRM.

According to Jim Davies, research director of customer relations management at Gartner:

> *Smaller organizations need to appreciate that CRM is a strategy that is enabled by technology, not a software tool. (Jim Davies, 2010)*

Another quote from "Only excellence matters for successful CRM" echoes a familiar refrain heard in business circles. Stuart Lauchlan again quotes Greg Gianforte:

> *Everyone associates CRM with sales automation. If you go into a company and say you do CRM, then the business manager will say, 'Oh, we tried that, it didn't work'. (Greg Gianforte, 2010)*

In all likelihood, the reason it didn't work was because the company ignored one or more of the basic requirements we have discussed. Their problem was to omit one or more of the following non-negotiable criteria for a successful CRM system:

- they did not ensure that a customer-centric culture was in place

- they did not get staff buy-in to the process

- they skimped on the planning and preparation

- they thought that now they have the software, everything else will fall into place and happen automatically.

The third pitfall – not setting clear goals

One of the most important challenges you will face in your quest to find and install the ideal CRM system is setting clear goals. You have to understand enough about your company's CRM requirements, not only for the current position, but also for the expected position in three to five years' time. This is vital because it ensures that you select the right product to support your CRM plans.

We have already stressed the importance of gathering information and specifying your requirements, and yes, it is tedious work. But without this information anticipating your future requirements is even more difficult.

In brief, the third pitfall is buying a CRM solution before you fully understand what the CRM requirements are for your particular business. Define objectives and set baselines for your CRM system. Clearly defined objectives means that you know what information should be stored in your CRM system. Clearly defined baselines, or benchmarks, means you have something to measure against when you start

running your CRM system. Martin Schneider, senior director of communications at CRM vendor SugarCRM, says:

> *All too often companies fail to set proper benchmarks [and] baselines. Nor do they set clear goals for their CRM initiative. To prove value, it is important to know what benefits you are seeing. So start tracking items like average time to close … number of phone calls needed to resolve cases, etc. This enables the company to measure ROI …* *(Martin Schneider)*

Training for Success

Training is not an area where you should even think about cutting corners and reducing costs. Any member of staff who believes they have not had adequate training is a potential threat to the system.

To get the most out of your system, and to get your employees to use the software effectively, you have to make provision to train each person who will use your system. This means that you send them off your premises to have professional training. There are both advantages and disadvantages to off-site training, so let's deviate a little to examine them in more detail.

It is probably cheaper and more convenient to have the training done on your premises. However, it is also more disruptive, both to the trainer and to the staff undergoing training. What will happen – and it always happens – is that some other staff member will knock on the door to ask someone on the training course a question, or require them to leave the training session to sort out some relatively minor mishap.

If the course were off your premises, the questions would wait until later, or be resolved by some other person. Most of the time, the issue is neither urgent nor a matter of great importance. So why accept interruptions to on premise training? We would suggest that it is because nobody takes on-premise training seriously. So, either you have off-premise training, or you have strict rules that govern access to course attendees – and the rules apply to everybody in the organization, from the owners and senior managers to junior clerks and cleaners. No exceptions.

Of course, holding training on your premises makes a lot of sense in that the staff can gain hands-on experience on a copy of your data. This can also help with

ironing out little problems in configuration, data integrity and system stability. But be wary of running training courses on-premise too early. You have to be sure that the system has settled down and all the major wobbles have been addressed. Having things go wrong with the system during training can be as disruptive as the inevitable run-of-the-mill interruptions. It's a tough choice – as waiting for the system to become stable means that staff are not getting trained and the backlog of data waiting to be input on the system becomes larger.

A common mistake with staff training is to send two or three key staff on intensive training and then expect them to train the rest of the staff on how to use the system. This fails for a few reasons.

- The staff not sent on training are made to feel less valuable and may well become resentful towards the system.

- The staff entrusted to train the other users may not have the ability, or the patience, to make good teachers.

- Generally, only twenty per cent of what is covered on a training course is retained by the course attendees. This means the staff entrusted with training their colleagues will only be able to explain 20% of what they learnt with any confidence. Given that the people being trained will only retain 20% of that, the bulk of your staff will end up only knowing 4% of the system.

Skills audits

The next major mistake with training relates to employee skills levels. The majority of your employees will not be familiar with the CRM system you choose, but some of them may well be computer literate in the real sense of the term. Others may be intimidated by the mere thought of a new system. You need to tailor training courses to cater for both levels of user. Ideally, you should conduct an audit of user computer skills and tailor courses accordingly.

A final word on training. Run refresher courses or workshops regularly, particularly after a new release of the software or a significant update, or when staff has had a long absence from work. Refresher courses are just that – a quick overview of the procedures and techniques – and should not take longer than half a day.

Management Support

We touched on the importance of management support for your CRM system earlier in the book. We do it again because without the visible and tangible support of every manager, from senior executives down to junior line managers, the project is dead in the starting blocks. Support for the system must be real – lip service is not good enough – and the actions of management must be seen to support their words.

Lack of visible management support is a major stumbling block. It may not be a common mistake, but it is serious enough to draw your attention to it again and again. In their *Top 10 trends in CRM for 2001*, the Gartner Group noted that:

> *In 32 per cent of sales technology projects, little or no use was made of the new technology 12 months after deployment. (Gartner, 2001)*

In a whitepaper called *Eight CRM Essentials*, Salesforce.com says:

> *There's nothing worse than investing in CRM and having no one show up. Too many CRM projects fail due to poor user adoption. (Salesforce.com)*

The literature on CRM systems is littered with quotes like these. From white papers to research results, from books on the subject to how-to guides, these sentiments are expressed in every conceivable way. Ignore the importance of management support for the system at your peril!

User Resistance

As common a problem as lack of real management support is user resistance. This is generally stated by the sales team in terms that run along the following lines:

- If it doesn't help me sell, I won't use it.

- If it doesn't help me close more deals, I won't use it.

- If it doesn't generate more qualified leads, I won't use it.

- If it doesn't cut my admin burden, I won't use it.

The causes of user resistance, and how resistance is expressed, will vary from company to company, depending on the specific culture and management style. However, the two most common causes are:

- The users were not consulted about their requirements. None of the primary users were involved in the selection process for the CRM system and, more often than not, their opinions about CRM systems were never asked.

- The product or solution does not automate any existing sales process in the company. Trying to impose a set of procedures on an already established method of working will always cause conflict. If the new procedures add additional processes without providing direct and tangible benefits to the user, the system is doomed to failure. Do not expect the users to change the way they already do things – this is unlikely. More often than not, they will find reasons and ways to avoid using the new procedures.

Get the Data Right

An IBM global data management survey of 600 major organizations found that 75 per cent of the respondents reported significant CRM system problems as a result of defective data, including violated contract terms, failure to bill or collect for services or products delivered, delays in or abandonment of new system projects and extra accounting costs.

Dirty data is one of the major problem areas with systems that are deemed to be failed. Take the time to do a full data audit and ruthlessly edit what you have.

Get the Timing Right

An oft cited cause of CRM project failure is that the project takes too long to implement. If you're a small business, and your system is still not fully functional after twelve months, you're in trouble. If it isn't, then you have probably chosen the wrong system or chosen a system for the wrong reasons.

When we spoke about ad-hoc teams and getting the job done quickly, we were not suggesting that you make hasty decisions. On the contrary, all your decisions in selecting and implementing CRM must be well considered. But don't waste your time drawing up lengthy reports couched in obscure terminology that will have the

reader pausing after every second paragraph to wonder what you really meant. George Orwell had some rules to make any writing easier to read and understand. These rules apply equally to fiction and to your reports.

- Never use a long word when a short one will do.

- If it is possible to cut a word out, always cut it out.

- Never use the passive where you can use the active.

- Never use a foreign phrase, a scientific word or a jargon word if you can think of an everyday English equivalent.

Keep both reports and meetings short. If you have staff that tends to take a long route to get to the point in meetings, remove the chairs from the room before the meeting. This thrust for brevity does not say that you should ignore pertinent information or skimp on the facts, it is merely to illustrate that there ways to keep the project ticking along well and at the same time cover all the important ground.

- Encourage staff to get to the point quickly

- to state the issue clearly and briefly

- to point out the implications, both good and bad

- to suggest remedies and approaches.

That's it.

Key Appointments

Appointing the right people to key positions is crucial for the success of the system. Start thinking now about who will fill the roles of system administrator, project sponsor, and project manager. Not having clearly defined roles and responsibilities for these three positions will trip you up as the implementation proceeds.

Project sponsor

The sponsor is accountable for the success or failure of the project. This is, potentially, a responsibility that can make or break a career; so it is no surprise

that the role of the sponsor includes selecting the project manager. Other tasks are:

- Championing the project by promoting and supporting it throughout the company

- Sourcing the necessary funding for the project

- Resolving issues that the project manager is unable or unwilling to resolve

- Ensuring that only the necessary function is delivered and that scope creep doesn't introduce nice-to-have features at greater cost

- Deciding, at each stage of the project, whether the project goes ahead or is abandoned

- Chairing the project steering committee, should there be one

Despite the responsibilities, this is not a hands-on position. By far the bulk of the day to day detail is delegated to the project manager. Of course, for a project with a very limited scope and a small project team, the sponsor could also assume the role of project manager, but this is rare and not recommended. The ideal is to have a sponsor who is senior enough to have the necessary influence and interested enough to play an active role when and where needed.

Project manager

The project manager is responsible for detailed planning, for the day to day management and control of the project, and reports directly to the project sponsor. This is often a senior manager within the organization, but may also be a specialist who is contracted to get the job done effectively. Among the responsibilities are:

- Defining roles and responsibilities for the project team and getting agreement from the team on those roles

- Planning everything from information gathering to data analysis, from system requirements to risk analysis and contingency planning

- Designing project control mechanisms and reporting procedures

- Managing, in conjunction with the project sponsor, project scope.

- Staying within the agreed-upon budget and timeframe

- Managing and reporting progress

- Being accountable for quality

System administrator

The earlier this person is identified, the sooner their grooming and training can begin. Although the duties of the system administrator only really begin once the system has been installed and commissioned, getting the designated person involved from the beginning is a must. To perform well, a system administrator must have a blend of technical skills, people skills and management ability.

The system administrator's prime responsibility is to support and maintain the system, and to plan for and respond to any problems that may arise. Other duties may include:

- Project management for systems-related projects

- Supervising or training technical support staff

- Being the consultant for problems beyond the knowledge of technical support staff

- Applying software system updates, patches, and configuration changes

- Installing and configuring new software

- Adding, removing, or updating user account information

- Answering technical queries

- Performing backups and ensuring system recovery procedures are in place

- Documenting the system configuration

- Troubleshooting any reported problems

Division of labor

A mistake more common than you might think, is not knowing who does what. And it is so easy to avoid this sort of problem. Basically, you take all the work that needs to be done to get your system running and divide it up between the team. Not only does this make your staff aware of what is required, it also prevents two large problems:

- Two people trying to do the same job because they both think it is their responsibility, a situation that often leads to a breakdown in working relationships.

- Things falling between the cracks because everybody thought somebody else was taking care of it – a situation we are all familiar with.

Once defined, the roles must be discussed with the team and adjustments made, if necessary. This is vital for clear understanding of who is expected to do what. Allow time for full discussion of the roles and responsibilities. Simply producing a list of who does what and emailing it to team members falls far short of promoting complete understanding. It needs to be talked through, and reviewed as the project progresses.

Risk analysis

Be warned that no matter how thorough your preparation and specifications are, there are still risks in a CRM system selection and installation process. You need to have done a complete risk assessment. Look carefully at every aspect of the business and think about how it may be affected by a CRM system. Then do a risk analysis and consider your options for contingency plans. What is the worst that could happen, and how would you deal with it? Also, read *The Essential Guide to Best Fit CRM* before making any final decisions. Your career and or your business may be on the line, so don't skimp on this.

Next Steps

Consult the rest of the series:

- *The Essential Guide to Articulating CRM Requirements*

- *The Essential Guide to Best Fit CRM*

- *The CRM Matrix*