11 Steps to a Successful CRM Implementation

Presented By

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# Table of Contents

**Steps to a Successful CRM Implementation** 3 - 13

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify Your Reasons</td>
<td>3</td>
</tr>
<tr>
<td>Communicate With Your Team</td>
<td>4</td>
</tr>
<tr>
<td>Research Vendors</td>
<td>5</td>
</tr>
<tr>
<td>Utilize RFPs</td>
<td>6</td>
</tr>
<tr>
<td>Evaluate Your Processes</td>
<td>7</td>
</tr>
<tr>
<td>Assess the Features/Benefits</td>
<td>8</td>
</tr>
<tr>
<td>Develop a Budget</td>
<td>9</td>
</tr>
<tr>
<td>Communicate With Your Vendor</td>
<td>10</td>
</tr>
<tr>
<td>Customizations</td>
<td>11</td>
</tr>
<tr>
<td>Integrations</td>
<td>12</td>
</tr>
<tr>
<td>Trickle-Down Implementation</td>
<td>13</td>
</tr>
</tbody>
</table>
Identify Your Reasons

The first step in creating a successful CRM implementation is to identify the exact reasons as for why you think your business would benefit from a new solution. Typically, businesses will seek out a new software solution when they’re dealing with a number of challenges or problems they think need to be addressed. If there aren’t any pain points, then it’s just to improve and grow as a business.

Your job is to identify these challenges or areas for improvement and clearly express your reasoning prior to getting too far into the vendor search process.

**PRO TIP**

If you can’t think of any major reasons as to why you need a CRM, you probably don’t. Not everyone is in the position to invest in one, and honest vendors will likely tell you just that during the selection process.
Is everyone on the same page? Have you brought the necessary individuals into the selection discussion, specifically your management team and sales department? If not, stop and reevaluate. Since it's a major decision that affects your entire organization, you need to have everyone on the same page and well-versed in your thought process.

Additionally, it's important to get everyone's input before you go too far into the process of implementing a CRM. Transparency will be extremely important in determining if the implementation is a success.

**PRO TIP**

Don't forget about your IT department. They'll be crucial to the success of a CRM implementation, so bring them into the equation as soon as possible.
Perhaps the most important (and challenging) parts of preparing for a CRM implementation is the researching of vendors. Unfortunately, there are a large amount of vendors out there that aren’t providing what you’re looking for (but still might trick you into thinking they are). There’s also a lot of vendors out there who are providing what you’re looking for.

It’s your job to investigate, compare/contrast, and find the vendor that’s perfect for your business. Consider the vendor’s knowledge of their solution, their references, their level of experience, their vision as a company, if they’re going to be a business partner or simply a seller, and the strength of their product offering, to name a few.

**PRO TIP**

While they shouldn’t be the only, or even most important, factor to consider, user-generated reviews can give you a general idea into how the CRM functions, support service quality, and more.
To find out a lot of the above information and, perhaps more importantly, to find out about the challenges, pain points, and needs of your business, consider utilizing a Request for Proposal (RFP) document. RFPs are a robust, comprehensive way to dig into the heart of why your business needs and would benefit from a customer relationship management solution.

You’ll also be able to hear from various vendors in detail about their product and services, and compare the documents among various competing vendors. If you want a new CRM and you want the best vendor for your business, creating an RFP is the way to go.

**PRO TIP**

Consider utilizing a Request for Information and/or a Request for Quote if you’re not ready to utilize an RFP document. These will both give you valuable information to assist in your CRM search.
Evaluate Your Processes

This step of the process will typically come into play when you’re developing your RFP document, but nevertheless is incredibly beneficial and necessary to a successful implementation. Speak with everyone that’s going to use or be affected by a new system. What are their needs or challenges or pain points currently, and what are they hoping to get out of a new customer relationship management solution?

You need to ensure that every user that’s going to be utilizing the new software solution is fully satisfied and willing and ready to start using the system consistently. In order for your new CRM system to succeed, you need to have active users that are willing to participate and stay up-to-date with it. If not, the usefulness of the solution is diminished.

PRO TIP

Keep in mind: a CRM system isn’t going to solve all of your business's problems. When evaluating your processes, keep in mind what will be changed with the new software implementation and what won’t.
Assess the Features/Benefits

As with the above step, this one's really already fulfilled by creating the RFP document. Regardless, assessing the benefits and deciding which benefits and features are most important to your business is a huge step in selecting the right solution. Typically, it's best advised for you to create a list of benefits and categorize them as either wants or needs. Once you've categorized each of the benefits and features you're seeking to find, you'll know the exacts needs for your business, which any vendor must have in order for them to even be considered, as well as the wants for your business, which help distinguish the vendors that already have the basic needs you're looking for.

With these two lists of items, you'll be well on your way to narrowing down vendors and picking a software partner.

PRO TIP

You're probably not going to get absolutely everything that you want from a CRM vendor. Come into the process with an open mind and be ready to negotiate some of your "wants."
A major part in the decision-making process is the budget you’re willing to spend on a CRM implementation. Don’t get me wrong: a budget is incredibly important and necessary. However, some people hold the cost of an implementation as the utmost priority and only focus on the price tag. If you’re guilty of this, you need to reconsider why you’re looking for a new software solution in the first place. Cost should never be the top priority when you’re making a major software decision. The results and benefits your business will receive should always be held in top priority, with cost as a major consideration.

In addition, be sure to discuss as openly as possible with your chosen CRM vendor about your expectations in terms of a financial investment so you can both work to meet your budget and stay on the same page.

**PRO TIP**

If you find that a CRM vendor’s offering is way cheaper than a competitor, do additional research. Just because a vendor has cheaper prices doesn't mean it'll be a better deal down the road.
Communicate With Your Vendor

One of the most common reasons as to why a customer relationship management tool implementation fails is because there's a lack of communication or a recurring misunderstanding between vendor and business. During the vendor selection process, it’s up to you to understand which vendor is going to treat you like a partner and which one’s going to treat you like just another customer.

From there, both you and the vendor need to hold open lines of communication in order for the implementation to go smoothly and for all expectations to be out in the open.

PRO TIP

Get references from potential CRM vendors, and have a list of questions (and follow-up questions) ready. Transparency and communication will be crucial going forward, and references might have helpful feedback for you to consider.
So, the first phase of the software implementation has been completed. While you might have had some initial customizations take place, now’s a great time to consider what you need customized further to fit your business’s unique demands, any additional users that you think should be added to the program, where you see the system evolving in the near future, and any feedback regarding what you think should be different or customized.

This helps the vendor know next steps and gives you a chance to listen to the feedback from your users (as well as any concerns or challenges that they’re facing).

**PRO TIP**

If the vendor doesn't offer a lot in terms of customization, it's probably best to look elsewhere. While over-customization can be problematic, you're going to want to be able to make the software work for you.
In addition to customizations, you need to think about integrations. Tell the vendor about all of the necessary integrations you’re considering for your business processes to run as smoothly as possible. Remember, the less siloed a business, the better it functions.

However, any existing integrations should be disclosed early on in the selection process. Do you already have an enterprise resource planning (ERP) solution in place? What about Inuit QuickBooks or a marketing automation platform? Your selection of a CRM vendor might be different because you have these integrations to worry about as well.

**PRO TIP**

Some vendors, such as OnContact CRM by WorkWise, have integrations in place. For example, you'll be able to get a complete customer relationship package, as well as contact center, marketing automation, and customer service software at no additional cost.
Trickle-Down Implementation

At the end of the day, an implementation is truly a success only when there’s total buy-in from upper levels of management. When management is involved in the process, there’s a sense of importance and commitment that lower-level employees and users feel toward the system.

Bring your management into the process in the beginning, encourage them to weigh in throughout the process, and you’ll be in a much better place when implementing the new solution and beyond.

PRO TIP

Consider creating a selection committee consisting of select individuals relevant to the discussion. This way, you’ll be able to share ideas and have a strong support system from start to finish.