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99 Ways to get more from your CRM Software

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Introduction

99 Ways To Get More From Your CRM Software was originally written by my colleague, Richard Boardman, as a series of posts in his blog 'The CRM Consultant', with the goal of providing a little inspiration to people looking to get more from their CRM software. And there are some real nuggets in here.

If there is one key message it is this: don't consider changing your CRM technology before you have conducted a thorough review. There are many ways in which you can make improvements to your current system and this e-book suggests just 99 of the ways. Let's face it, CRM projects don't fail because the technology doesn't work. It normally does.

The key to CRM success is knowing what you are looking to achieve. So the critical foundation for any CRM project is to define what business outcomes are desired and how they will be realised.

People

You can have the best system in the world but if you can't get people to use it in a consistent and structured way it won't add any business value.

User adoption remains the biggest challenge organisations face when deploying CRM technology.

Technology

With so many CRM technology options available, finding the best one can be a challenge. Find an independent implementer who can make recommendations based on your requirements and costs, rather than their desire to sell software licences of a particular flavour.

Process

In order to achieve your desired business outcomes, it's important that your business processes are properly supported by the system.

In the first instance, identify how your existing business processes can be streamlined, and identify any additional processes, such as data quality management, that need to be in place to support the system.

The 99 Ways

1 Integrate with your finance system – providing easy access to customer financial data, such as invoice history, can help your sales team detect changes in buying patterns, spot new opportunities, and reduce customer churn.

2 Improve data management processes – poor quality data can damage your reputation and reduce the impact of your marketing. Introducing new processes to review the data going into your system can have a big impact on data quality.

3 Strip out unwanted customisations – there's probably plenty of capabilities in your CRM that you're no longer using. These can confuse users and impact usage. Consider stripping them out or hiding them to make usage easier.

4 Add users – who in your business isn't using the CRM system, but should? There's generally a lot more people interacting with customers and prospects than the sales and marketing team. Providing broader access to the CRM system can allow you to capture a wider range of customer insights.

5 Review mail-merge templates – mail-merge templates are a great way of allowing your users to quickly produce high quality documents and correspondence. Check whether they're up to date and that you've got the full range you need.

6 Capture social profiles – with the social dimension of marketing becoming so much more important, start to improve the tracking of key social data including Twitter, LinkedIn, and Facebook profiles.

7 Analyse usage patterns – are people using the system in the way they're meant to? If they're not, develop a plan to get usage back on track.

8 Manage quotations – many organisations struggle to maintain visibility of proposals and quotations. Your CRM system can help streamline the production of quotations and track what has been sent out.

9 Do you have the latest version? – is your current system on the latest version? When will support end, and could an upgrade bring you important new functionality?

10 Training – have all users had the depth and quality of training to make best use of the technology? If not, providing top-up training for

existing users and ensuring new staff receive thorough training when they join, can have a big impact on the effectiveness of your CRM system.

11 Start to track customer profitability – which customers make you the most money? The answer is not always obvious. Using the system to track customer profitability can give you a whole new perspective on customer management

12 Review your reports – are the reports in your system producing insightful data? For many organisations the 'out of the box' reports aren't terribly insightful. Developing custom reports based on your specific business processes can be key to driving value from your system.

13 Gamify – can you bring in game play mechanics to drive up usage of your system?

14 Have you got the 360 degree view? – can you see all of the interactions with your customers? What existing customer facing processes could you bring into the system, or what other applications could you integrate with to increase your access to key customer data?

15 Share of purse – do you understand how much your customers are spending on the products and services you sell, and what percentage you have of that spend? Tracking this information through your CRM system can help you focus your resources on the most attractive opportunities

16 Tracking time spent – which customers do your staff spend the most time with? Are these the ones with the greatest potential? Tracking where staff spend their time versus where the greatest potential opportunities lie, can help you uncover mismatches that are costing you business.

17 Change management control – many organisations fail to adapt their CRM systems to meet changing needs over time resulting in premature system obsolescence. Ensure you have the budgets and processes in place to efficiently approve, implement and introduce changes in order to maximise the lifetime value of your system.

18 Provide ready access to sales collateral – what collateral do your sales teams need to sell effectively? Is it up to date, and readily to hand? Managing sales collateral within the CRM system can be the most effective way to ensure these tools are readily accessible when needed, and that staff are using the latest version.

19 Discount management – managing the discounts being offered to customers can be a key way to improve sales margins. Supporting the discount approval process within the CRM system can be a very effective way of reducing unnecessary discounts.

20 Social listening – using tools to monitor the social conversations about your company, brands, and markets and using the CRM system to assign actions where appropriate, can be a powerful means of uncovering new trends, insights, and opportunities.

21 Integrate with postcode software - integrating your CRM with one of the many postcode address auto-fill applications, can be a very effective way to increase the speed of adding records to your system as well as improving data quality.

22 Configuring dashboards – with most CRM applications now shipping with reporting dashboards, tailoring dashboards so that they meet the needs of the different CRM users in your business can ensure staff have the information they need to perform more effectively.

23 Remove duplicates – most CRM systems accumulate a large number of duplicate records over time. These can be reduced by checking that your de-duplication on entry rules are correct, and using tools to detect and merge potential duplicate records.

24 Assess your implementation partner – is your implementation partner performing well, or holding you back? If it's the latter, finding a new supplier may be the breath of fresh air you need to take your system forward.

25 Closed loop lead management – many prospective customers aren't ready to buy when they first make contact with your organisation. Logging and tracking these leads through the CRM system ensures you don't lose visibility of them, and will help you increase conversion rates over the long term.

26 Go mobile – there's an ever increasing range of client options for smart phones and tablet devices. These can give staff better access to data when they're out on the road, as well as the opportunity to update the system on the move. Providing these capabilities to those that need them can help improve performance and productivity.

27 Analytics – the 'out of the box' reporting capabilities may not provide the management information you need. Using third party analytics packages may be the secret to unlocking the potential of your data.

28 Track entertaining – with increasing regulation around business entertaining, the CRM system can be helpful in tracking where your entertaining budget is being spent, and how well expenditure aligns with your high potential customers and prospects.

29 Telephony integration – integrating the CRM and telephony systems can help improve customer service by automatically popping up the relevant contact record when they call in, avoiding the need to search the system to find their details. It can also aid data capture by automatically logging the details of both incoming and outgoing calls.

30 Internal collaboration – enterprise social collaboration tools such as Salesforce.com's Chatter, and Microsoft's Yammer, can help your teams work together more effectively on customers, projects, and opportunities.

31 Managing pre-sales resources – scarce pre-sales resources can sometimes be allocated to the person who shouts loudest rather than to the area of greatest opportunity. CRM can be a great place to provide more structure around this process, and help ensure that resources are allocated to the areas of greatest potential.

32 Check your data hygiene processes are understood – if an email bounces, a mailing piece is returned, or a customer contact leaves, do all users understand how they should be recording this in the system? The answer for many organisations is no. Taking the time to define data hygiene policies, communicate them, and checking they're being implemented can significantly boost the quality of your data.

33 Review how you support your processes in the system – I often get clients to show me how they use the system to support their business processes. Invariably I can spot ways to cut down on key strokes or unnecessary data entry to make things quicker. Taking the time to analyse whether there's a quicker way of doing things can have a big impact on productivity.

34 Track customer products – which of your products or services are your customers using? It might seem obvious, but it's not information that's always readily available in the CRM system. Ensuring this data is accessible though can improve customer support, and increase the potential to cross-sell other products and services.

35 Track competitor products – what products are your competitors providing to your customers and prospects? Tracking useful information such as purchase dates, products specifications, and contract end dates can be a great source of future leads.

36 Do you have a trained administrator? – a well-trained system administrator can drive up user adoption, and reduce the reliance on expensive external resources, so making an investment in administration training can have a rapid payback.

37 Bring customer support into the system – a lot of organisations use a separate customer support system. With the inbuilt helpdesk/case management tools becoming increasingly sophisticated in many CRM packages, consolidating the support function within the CRM system can help improve the visibility of key customer data and reduce the cost of running two systems.

38 Provide offline access – with many CRM applications providing users with the ability to operate 'off-line' and synchronise their data later, setting this up for those that need it can have a big impact on productivity when travelling or where internet access is patchy or unpredictable.

39 Use marketing automation tools – marketing automation tools allow you to monitor a prospect's interactions with your web site, set up automated lead nurturing campaigns, and identify leads that are sales-ready. Many of these packages have integrations with CRM applications, and can help you focus your resources on the most promising opportunities, particularly if you have high lead volumes.

40 Clean your data – Your data may look up to date, but when was it last validated? Use internal resources or an external telemarketing agency, to check contact details are still current and update them as required.

41 Complaint tracking – Do you have a process for managing customer complaints? For many organisations it's informal, or held outside the CRM system. Tracking and managing customer complaints within the CRM application can increase the visibility of issues to customer facing staff, and allow better reporting of incidents to help organisations take proactive actions to address the root causes of problems.

42 Internal lead capture – it's not just the sales

and marketing team that come across sales leads. Many different staff members may come into contact with customers and prospects and spot new opportunities. Having the ability for them to log them quickly and easily will ensure that a much greater proportion of these are passed on to those best able to action them.

43 Make opt outs more granular – prospects and customers may opt out of receiving communications, but not necessarily all communications. For example, they may not want to receive the newsletter but may still want to be invited to seminars. Many systems are set up in a binary way. You receive all or no communications. Consider adjusting the system so that contacts can opt in and out of different communication types. This avoids unnecessarily removing people from communications they would still like to receive.

44 Get data entry assistance – are there people that never update the system but should? Sometimes the most effective solution is to get them some help. For example, one client has a simple but effective approach of a bowl placed in reception for staff to drop in business cards as they return from meetings. These are then input by the administration team. For those souls that can't be persuaded to use CRM technology, giving them assistance may be a worthwhile last resort to ensure the valuable information they gather is retained.

45 Get feedback – what's working well in the CRM system and what could be improved? Often those responsible for the system aren't best placed to provide this feedback. Providing an easy means for front-line staff to identify potential changes and improvements can be the most effective way to help develop your system.

46 Review data capture – what data are you capturing? Is it the information you need? Are you capturing data you don't use? Reviewing what data is useful to you, versus what you actually gather, can reduce wasted effort and help you get what you need to target your resources more successfully.

47 Fill the gaps in your data – if you find there's potentially useful data which you're not currently tracking, jump start the process by approaching data providers to see if they're able to fill the gaps.

48 Segment your customer base – different customers have different needs and varying degrees of value and potential for growth. Defining different approaches to managing different customer segments can be a very effective way of focusing resources in the most promising areas. The CRM system can be used to support this segmentation and help monitor that each customer segment is receiving the defined level of support.

49 Are you paying too much for support? – once upon a time support contracts were a pretty regulation 10% of the price of the software. In recent times the formulations have become rather more exotic and there can be huge variations in terms of how much companies pay for help desk support services. Going out to the market to look at other options can be a very effective way to drive down on-going costs.

50 Order management and fulfilment – while many businesses use their CRM system to track sales opportunities, fewer use it to manage the order process itself. The CRM system can be a very

effective tool for managing orders and their fulfillment, particularly if there's integration into the finance system. It can help reduce the administration time for each order and improve the quality of delivery. It also has the added benefit of encouraging sales people to record sales opportunities, thereby increasing forecast accuracy.

51 Customer portals – the CRM system doesn't have to be just for your own staff. Providing access through a portal to customers and other stakeholders, such as channel partners, can improve customer service and reduce the overhead of updating the system in-house.

52 Booking rooms and other resources – with many users managing their diaries within the CRM system, using the same system to book resources, such as meeting rooms and demonstration equipment, can help improve productivity while making more efficient use of existing facilities and reducing the cost of external room hire.

53 Review third party tools – most CRM products have a wealth of third party developed add-on modules often available through on-line markets such as Salesforce.com's AppExchange. It can be worth researching what's available to see if they can fill gaps in out of the box functionality, or cost-effectively give you new capabilities.

54 In jeopardy accounts – the CRM system can be a very effective place to track customers who are considered to be 'at risk'. Providing visibility in the system can alert customer-facing staff, and help focus efforts towards turning things around.

55 Integrate lead capture forms – integrating your CRM system with your lead capture form on the web site can reduce the need to re-key data and increase the speed with which leads are distributed and responded to.

56 Retention alerts – for many businesses there are early indicators that a customer relationship may be winding down. For example, use of the product or service might suddenly dip, or the number of service calls may escalate. A timely prompt though may allow the situation to be successfully rectified. Setting up automated alerts within your CRM system, based on defined conditions, can be an easy way to get the early warnings you need to help you retain more customers.

57 Develop a usage manual – does everyone understand how they should be using the system? Often different people will use it in different ways, and that impacts key outputs such as reports. Creating a usage manual will help define how the system is to be updated and provide the foundation for more consistent usage patterns.

58 Develop a lead nurturing strategy – most potential customers are not ready to buy when they first make contact, but staying in touch can be tricky over the long term, particularly as salespeople focus on short term targets. Developing a communications approach, supported by the CRM system, which nurtures and develops a lead over the long term, can have a huge impact on lead conversion rates.

59 Are you ready for when staff leave? – inevitably people will move on. This can be disruptive, but the impact can be minimised

depending on how much information you're able to retain, and how quickly you can get their replacement up to speed. In this context, it's often worth reviewing if there's additional data you could capture to cut the lead-time to replacement staff members becoming effective.

60 Sharing finds – most CRM applications allow users to develop and save pre-defined searches, for example, my sales opportunities due to close in the next 60 days with a value in excess of £x. Rather than each user independently spend time setting up their own, try and share the best examples with all users. This improves the availability of information and reduces duplicated efforts.

61 Integrate with your email campaign marketing application – many organisations use a separate service like MailChimp to manage their email marketing campaigns. Most of these applications have pre-existing integrations to CRM packages, and these will reduce the time involved in managing two databases and increase the visibility of campaign data in the CRM system.

62 Are you making best use of the data you gather? – a lot of potentially useful data gathered about customers and prospects never makes it into the CRM system, but ends up hoarded away in spread sheets. This often reflects a lack of confidence in using the data import tools that come with most systems. While it's true you can do a lot of damage with a poorly executed data import, building up good internal proficiency with these tools can help you improve the depth and quality of your data.

63 Track competitive activity data – you're inevitably running into competitors, but few organisations fully use the competitor intelligence they gather to their benefit. The CRM system can be used both to record competitor data such win/loss information, pricing, key features etc., but also to ensure this information is made available to those who need it.

64 Go agile – if you're struggling to introduce new capabilities using the traditional waterfall approach to development, where requirements are defined and documented in detail up front, experiment with more agile approaches where users are more heavily involved in the development process. This may cut development time-lines, costs, and the deliverables may more closely meet users' needs.

65 Issue management – I covered complaint management in idea 41, but there are an array of issues that fall short of a formal complaint. A lot of organisations will shy away from tracking these for fear of over-exposing mistakes, but if a company has an open culture geared towards learning from errors and failings, rather than punishing them, recording them in a system can be a very effective way to make big quality gains.

66 System consolidation – the flexible design of most modern CRM systems means that they can cost-effectively address a wide range of needs. Using these technologies to replace and consolidate existing systems – even if they don't add value from a customer data perspective – can be an opportunity to significantly reduce IT costs.

67 Account planning – a lot of businesses have a major account planning process, but the outputs of these are often filed away and only dusted off at the start of the next planning cycle. Managing the account planning process within the CRM system can provide much better visibility of the agreed plan, and increase the likelihood that the specified objectives will be met.

68 Improve internal support – the easier it is for users to get help and advice, the better their use of the system. Improving the skills and knowledge of the help desk staff responsible for the system can have a big impact on how well the system is used.

69 Review your processes – analysing your existing business processes can be extremely insightful. You may find they don't work quite as well as was thought, and there are often opportunities to improve them. Managing the revised processes within the CRM system can help create efficiencies through automation as well as providing better monitoring capabilities.

70 Workflow tools – many CRM systems have built-in workflow tools that allow for automated actions and activities when defined conditions are met. These are generally easy to set up and can be used beneficially in many different ways, from improving productivity to ensuring that staff are alerted to situations that they need to be aware of.

71 Tracking cost per lead – using your closed loop lead management process (see 25) to log the source of each lead, while also tracking marketing campaign costs, will potentially improve the visibility of cost per lead. This data will allow you to double-down on the marketing campaigns with the highest return on investment and scale back on areas with lower returns, enabling you to get a lot more from your marketing budget.

72 Tailor views to the needs of each team – many CRM systems allow you to have different views of the system depending on the role of the user. This can be important if the system is supporting multiple areas of the business with differing data capture requirements. Using the views functionality to just display the data each user needs can significantly increase productivity.

73 End of life marketing campaigns – do your products or services have a defined life-cycle? For example, a piece of equipment might become uneconomic to use after a certain period, or there's a specific contract end date. Consider how the CRM system can be used to coordinate your sales, marketing, and service activities as the end date approaches in order to increase the percentage that purchase from you again.

74 User groups – user groups can be a very useful source of information and new ideas to help you get more from your system. Explore if there are existing groups that you could join, and if not consider if it might be worth creating one.

75 Integrate survey data – many businesses use online survey tools to track customer satisfaction and gather feedback. Most of these applications have integrations which will store survey results against the relevant record in the CRM system. This enables you to enhance the depth and quality of stored data, and will allow actions to be triggered based on the survey results, for example an alert to the relevant manager if a satisfaction score is below a defined threshold.

76 Consider the customer journey – analysing how a customer interacts with the range of

touch-points in your organization, and looking at how that that experience can be improved, may lead you to develop your CRM system in ways you hadn't previously considered.

77 Improve system availability – the more your CRM system does for your business the more vulnerable you are to system failures. Reviewing how you can make your systems more resilient, as well as developing detailed contingency plans, can go a long way to reduce the likelihood and impact of outages.

78 Tracking reference customers – arranging reference calls and visits for prospective customers is generally a key part of the sales process, but many companies struggle to develop enough reference accounts to avoid this becoming a time-consuming and frustrating exercise. Using the CRM system to identify current and potential references, help nurture and develop them over time, and ensure they're not over-used, can help win more customers, reduce the sales cycle and increase productivity.

79 Document management – are useful customer documents easily available through the CRM system? It's not unusual for important files to sit in filing cabinets or individual hard drives where they can't easily be accessed. Using the CRM system to manage documents, or provide easy access to them, for example through integration with a document management system, can significantly improve the effectiveness of customer-facing staff.

80 Testing and training environments – if you don't already have them in place, installing separate testing and training environments can help you test and roll out new capabilities more quickly and easily without disrupting your main production system. Most on-premise software licences allow you to set these up without further charge, and many cloud-based solutions provide 'sandbox' environments for this purpose.

81 Manage major bids – major bids can be complex, expensive, and involve extensive collaboration between teams. Using the CRM system to manage, and potentially streamline, the major bid process, can help businesses avoid the cost of bidding on unwinnable opportunities, improve productivity, and increase win rates.

82 Extend CRM's horizons – are there other areas of the business not using CRM? Other offices, teams, functions, locations, subsidiaries, international operations? Extending CRM beyond its existing boundaries can be a very effective way to spread best practices across the breadth of the organization.

83 Improve opportunity management – does your sales opportunity tracking help or hinder the salesperson? Ideally it should help the salesperson gather the information they need to know about an opportunity and for sales management to validate it. Tuning this area so it better supports your sales processes can have a big effect on lead conversion.

84 Monitor a day in the life of – if you're managing a CRM system how well do you understand your users? Spending time with them to see what their job entails, and how well the system currently supports them, can help identify new opportunities to increase their productivity and effectiveness.

85 Are your customers getting looked after? – are your customers receiving the attention they deserve? Do they have a designated account manager, and are they making regular contact? It's not unusual for a customer to be orphaned because of a change of personnel or sales territory or for a salesperson's attention to wander. Developing the reporting and processes to identify these customers early can have a big impact on retention and life-time value.

86 Configuration management – many companies sell complex solutions which need to be configured for the needs of each customer, and it can be easy to make errors, particularly for inexperienced staff. Using configuration management add-ons within your CRM system can reduce the overhead on internal resources, such as pre-sales, and reduce the number, cost, and impact of configuration errors.

87 Outsource administration – as we've touched on in previous points, the CRM administrative function is key to ongoing success, but training up an in-house administrator may not be a practical option for all organisations, so consider outsourcing this function externally if necessary.

88 Lead scoring – scoring the leads you receive, whether it's done through marketing automation or manually as part of your lead management process, helps focus resources on the most promising opportunities and can help improve lead conversion rates.

89 Develop a long term plan – a lot of CRM systems come to a grinding halt after the initial implementation because there's no plan for the future. Defining a long term vision, backed by appropriate budgets and resources, is key to realizing CRM technology's potential.

90 Extend your reach within your customers – many businesses have very limited reach within their customers. A salesperson, for example, may be in (often occasional) touch with one or a handful of customer contacts. These limited channels often constrain the ability to develop a customer and make you vulnerable if a key connection leaves. Using the CRM system to support a fuller and broader picture of your customer contacts, and implementing an appropriate communications plan, can have a profound impact on your ability to cross-sell, up-sell, and retain your customers.

91 Contract management – using the system to manage the contracts that you have, both with your customers and other parties such as suppliers, can help increase their visibility to the staff who need to be aware of them, and help you manage key milestones such as renewal and end dates.

92 Managing acquisitions – using the CRM system to support new acquisitions can have a big impact on the success of these mergers. If there are acquisitions in the offing, and if the plan is for them to use the central system, ensuring you have the means and resources to add their users, processes, and data quickly can help you assimilate acquisitions faster and more successfully.

93 Improve forecasting accuracy – visibility of future business volumes is key to a company's ability to plan and allocate its resources effectively, but forecast accuracy is something many companies struggle with. Reviewing and refining your approach to opportunity management with your CRM system can have a big impact on the reliability of sales forecasts.

94 Look for gaps – what isn't in your CRM system is sometimes as important as what is. Are their prospects, influencers, or even customers, that aren't in the CRM system, but should be? Looking for gaps in coverage can be a great way to find new opportunities.

95 Manage quote approval – do you know what quotes and proposals are being sent out? Are they priced correctly, accurate, reflect company branding, and contain up to date marketing collateral? Developing quote approval processes supported by the CRM system, can be an easy way to monitor and improve quality and increase conversion rates.

96 Web site integration – you may capture a range of interactions through your web site including leads, questions, complaints, and support issues, but are these forms integrated the CRM system? Better integration with the web site has the potential to reduce the double entry of data and increase customer service.

97 Following up lapsed customers – lapsed customers may not be buying from you now, but some at least will buy from you again. Developing a set of processes – supported by the CRM system – to efficiently maintain a relationship can have a big impact on the number that buy again.

98 Onboarding – the customer experience when they first buy from you will often set the tone for the whole relationship that follows. Taking the time to ensure that new customers are happy with your products and services can have a huge impact on the life time value of that relationship. Using the CRM system to support these 'on-boarding' processes can be a very effective way to increase customer satisfaction.

99 Get a fresh perspective – okay, ninety-nine points in, this one's a little self-serving, but if you're not sure of the best way to take things forward consider getting some outside advice. There are a number of independent CRM consultancies around, including our own, who can use their experience to help you unlock the potential of your CRM technology.

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