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3 Skills Critical for CRM Success

By Tanya Maslach on July 30, 2008

When it comes to CRM, culture is more important than technology.

Your company has covered the major bases of **CRM implementation**. A team of **experts** has researched **vendor CRM systems** for your business, and has calculated potential costs. You, in turn, have **budgeted** for a CRM solution and have readied all current **databases** for its implementation. Chances of a successful CRM **rollout** are high — right?

You've forgotten one essential component. The people.

For a CRM implementation to be successful, you must go beyond satisfying technical requirements. After all, if it was only the technical elements that ensured success, would CRM software ever have been created?

The following steps for a good CRM launch aren't meant to be easy. They require your deliberate focus on building relationships with team members and fostering an environment for employees to do the same with each other. They also demand more of your time for activities you're probably doing too little of now. If you focus at least 35 percent of your time on these areas, you'll not only significantly improve your chances for a successful CRM implementation, but you'll begin to notice improvements in **sales revenue**, team **morale**, customer referrals, employee accountability and even employee **leadership**. Your deliberate focus on these steps will have lasting results beyond the CRM rollout.

1. Setting the "How We Do It Around Here" Culture: Before you begin the CRM implementation, discuss issues including accountability, potential areas of resistance and **teamwork** with the staff members leading the launch. Ask questions like, "What is our culture of accountability? Do we operate in fear of how this system may expose our weaknesses, or do we believe that it is a tool to help us improve?" Dig to uncover the roots of potential problems and determine how the team will operate when difficulties arise. Setting cultural norms about team behavior and realistic expectations for speed of implementation will prevent future episodes of lowered team **productivity** as well as a disengaged and aloof mentality. It will also ensure members are keeping the long-term goals of **customer loyalty**, increased sales and referrals in sight.

In addition, introduce and encourage **collaboration** among departments. Although **good planning** is critical for a successful CRM rollout, feedback from sales, **marketing** and **call-center representatives** can expose unforeseen issues and improve the launch. Think of it as your built-in **training** network — another way for staff to learn and use the new system in better, improved ways with you facilitating the process. If departments aren't collaborating, it's time to meet with

key team members to solicit feedback and design action plans for such cooperation to occur. You can also offer valuable **reward** systems to encourage this behavior.

2. Advertise Achieved Goals to Build Pride: No matter how small, promote early wins of the CRM implementation. No one will appreciate this more than the teams responsible for carrying the load of the launch at its earliest point. Use the cross-department collaboration efforts to gather this data, asking questions like, “What ways can we measure our progress?” and “Are we paying close enough attention to group issues (**turnover**, employee resistance) and how they impact our desired end **goal**?” Encourage the teams to use provided tools to observe changes in momentum and make appropriate changes.

3. Communicate, Inquire and Ask Some More: Get the picture? No matter what you do or don't do, say or don't say, you're communicating to your team. Asking supportive questions positions you as a facilitator of the process and someone who's there to help others succeed. Demonstrate effective leadership by reiterating the goals you've laid out as critical for CRM — and **coach** others to ensure those are understood and achieved. Ask questions and seek constant feedback on your performance. Are you helping employees develop genuine, productive and lasting relationships with customers? What can you change to eliminate obstacles for your customers and your employees? Are there unanticipated glitches in the CRM implementation? If so, how are the teams taking accountability for solving issues and inviting you for counsel?

Employ methods for keeping the communication loop open for continuous improvement purposes. How often do people suggest ideas to make the system better? When they do, what happens? Are there elements of the system preventing you from serving customers better, faster and more genuinely? If so, how quickly do you hear about it (if at all) and how quickly do you respond? Get answers to these questions and use them when making a case for successful CRM. The team will be proud, individuals will feel supported and you will be providing additional motivation for everyone to keep up the stellar performance.

Dedicating a good portion of your time to asking questions, learning about morale issues early and measuring progress will not only effect the success rate of your CRM implementation, but will guarantee to offer insight into upcoming leaders in your organization and high customer satisfaction. Who isn't happy with that?

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