The I.T Director's Guide to Selecting CRM

A Collier Pickard Publication

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In this eBook we'll cover:

- CRM and your role

- Mitigating Risks: Data + People

- Pathways to successful Implementation

- The next steps you need to take

But it's easy to get distracted during the research stage of a project, so if you need to cut to the chase at any point just click the Collier Pickard **symbol** to talk to our team.

Or, if you're not ready for a chat with one Of our consultants, you can always connect with us on one of these networks:

Or read some more CRM articles on our blog, or just send us an email or drop us a line:
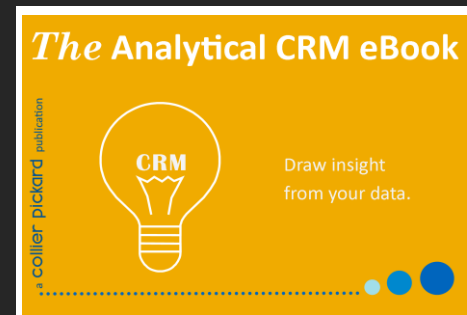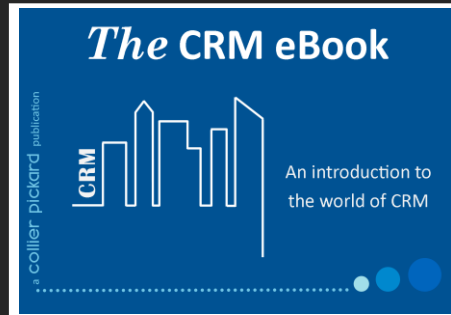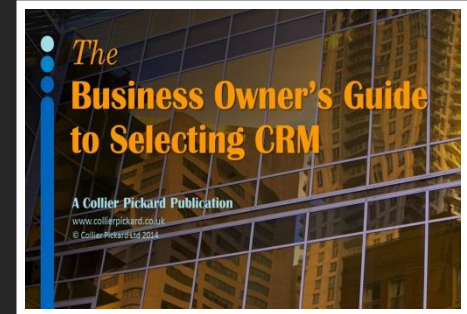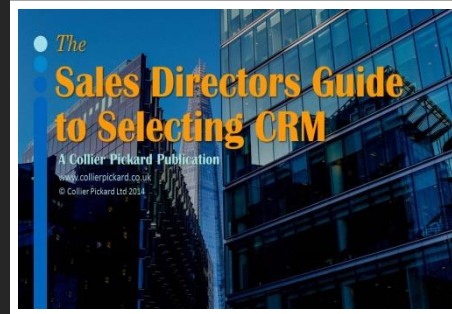
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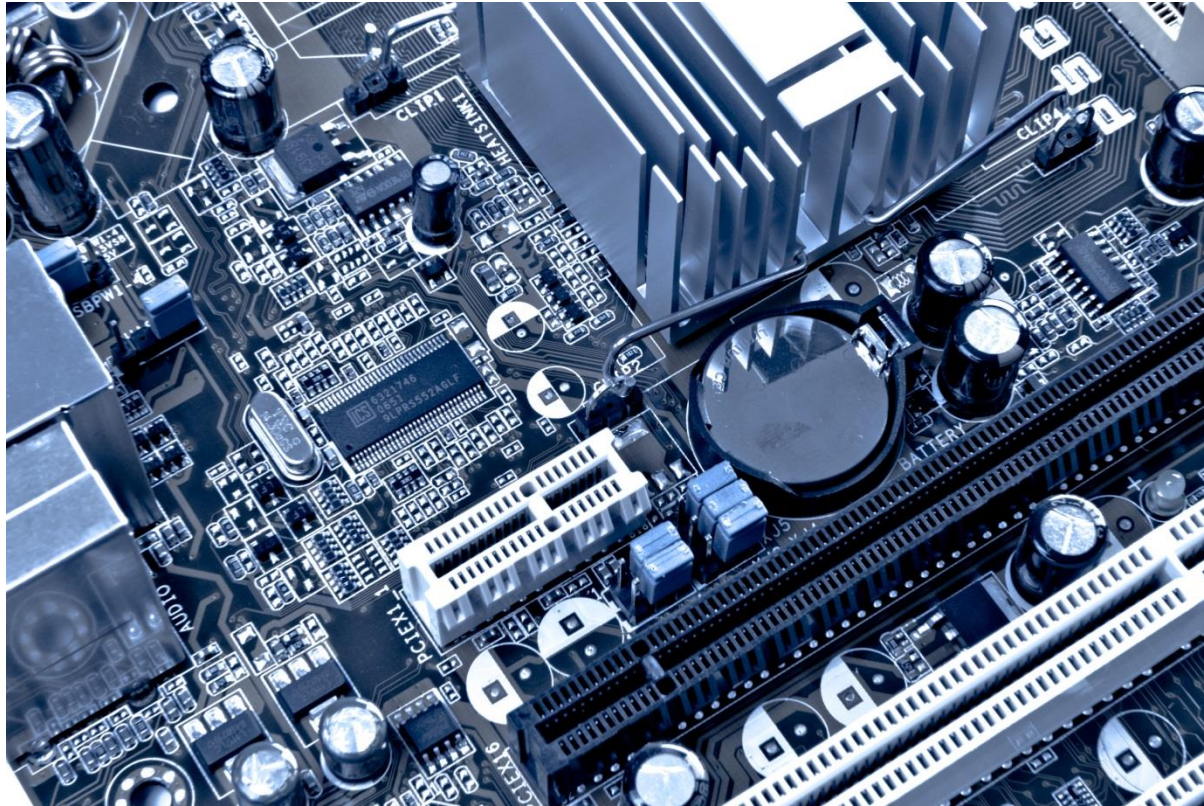
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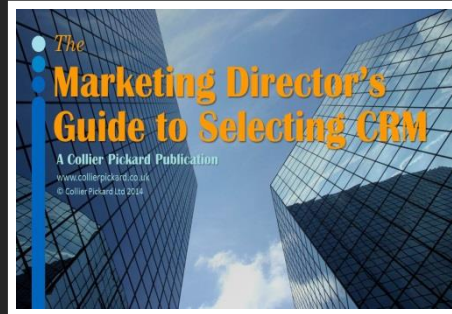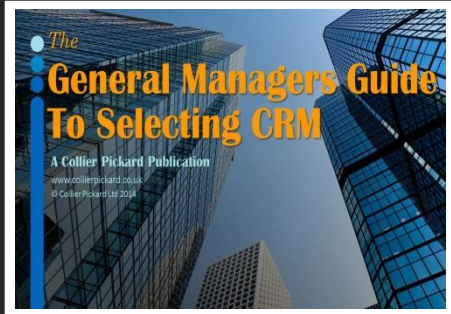
If you'd like some handy guides to help you communicate the message about CRM and guide your team we have a range of eBooks that can help – starting with *The* CRM eBook – What Works... What Doesn't.

[Click Here For Complete Library](#)

Modern businesses are demanding that technology "**earns its keep**" and delivers a measurable return on investment (ROI). As an **IT director**, your challenge is to prioritise, select, implement and support technologies that address every business need.

You need to find systems that improve employee efficiency, whilst reducing operating costs. Systems which are easy to use, but which address complicated business requirements.

The added challenge is that you need to do all that within a budget…

In this **eBook** we've created a guide to the **Selection of CRM** for IT Directors and to avoiding some of the pitfalls commonly associated with this technology.

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Primary benefits of CRM

We'll assume that you've already got a good understanding of the basics of CRM. That you have understood that Customer Relationship Management concerns everything your organisation does to **Acquire**, **Develop** and **Retain** profitable customers.

But if you are still looking for a simple concise guide to CRM for business managers, then start here.

This guide will try to dive under the business requirements to highlight the **IT challenges**, and provide practical guidance on CRM from an IT director's perspective.

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In technology terms CRM is a complex suite of applications that address the needs of **marketing, sales** and **customer service personnel**. These needs might include:-

- Sending bulk emails
- Integration with your webstore and ecommerce sites
- Data collected by sales people on the road
- Integration of core accounting data
- Automation of a quote to order process
- Client satisfaction and survey management
- Seminar and event management
- Diary and calendar management
- Resource planning
- Compliance reporting
- Management of commercial and technical authorisations.

In fact the list is constantly growing and evolving as businesses find new ways of interacting with customers and prospects.

As an **IT director** used to dealing with clearly defined systems CRM represents a number of **challenges**. But before we deal with those challenges it is worth defining CRM in IT terms.

The I.T Perspective to CRM
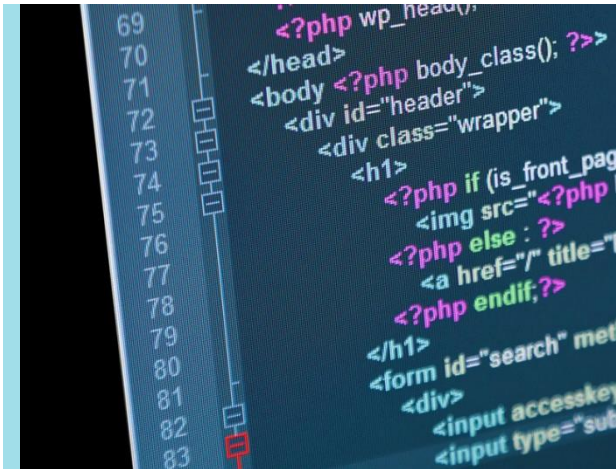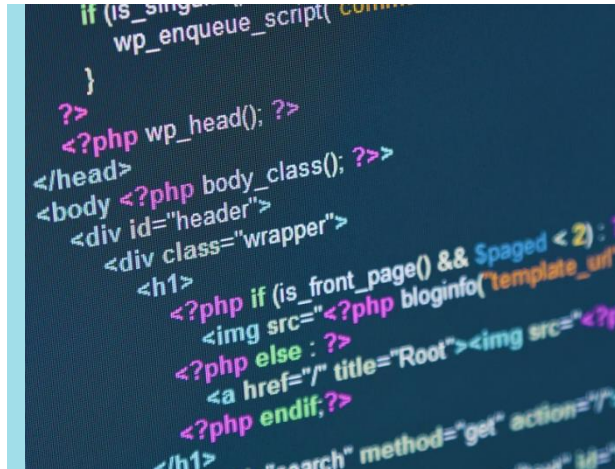
At the heart of any CRM system is **data** held in a **database**. This needs to be **accessed** by a range of **users** with very different requirements. It needs an **administration** tool that controls user access.

The database will also need to **integrate** with other systems. So it will need a **toolkit** to allow for the development of links to those systems. It will need to **import** data from different sources.
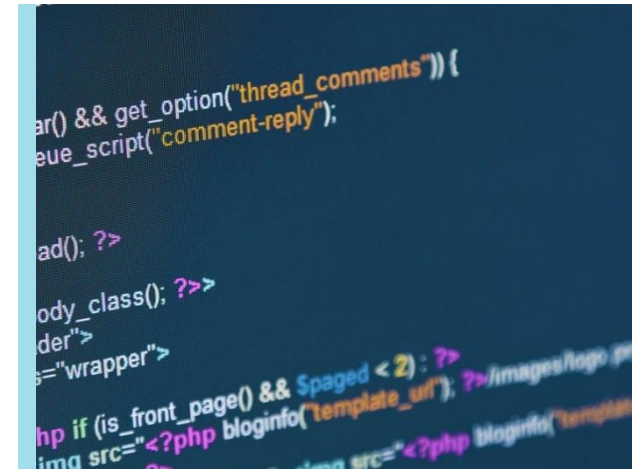
To use the CRM system there needs to be a user **client**, or **application**. To save time and money it should also integrate with existing **Office Applications.**

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The I.T Perspective to CRM

Unlike many systems CRM needs to evolve over time so it needs **development tools**. These should range from **end user tools to IT developer tools.**
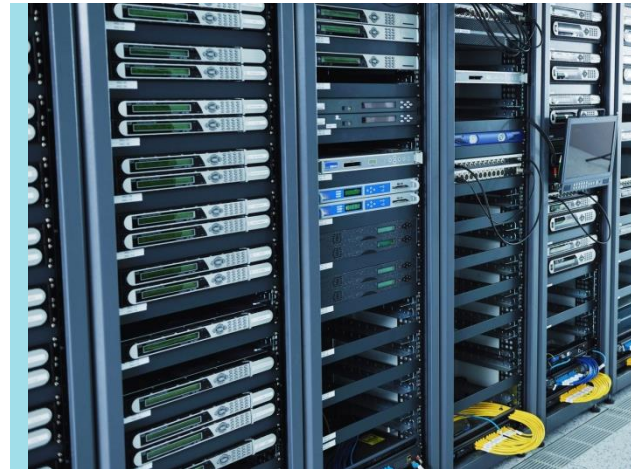
To further reduce costs and time to implement, CRM needs an active **partner community** and **3rd party developers** who provide commonly required functionality through an easily accessible marketplace**.**

CRM needs tools to **analyse** and **report** on the data it collects. Tools to **design** and **monitor business processes**, and **automate common tasks.** You also need tools to **backup** and **secure** the data from threats.

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By reducing CRM to just the IT elements, highlighted on the previous page, you **increase** the **risk** of CRM project failure. But Why?

CRM is NOT just an IT application. To succeed CRM relies on changes to your company culture and how you do business. Changes in **culture** and **process** that will hopefully be acted on by people. Sales people, marketing people, people inside and outside of your organisation. Changes in what they do, and what they expect, changes in what is measured and how it is measured. Changes in everything you do to Acquire, Develop and Retain customers.

No matter how impressive the CRM software you select, implement and support, without those changes the **CRM project will fail.**

Project Risks: People

Not everyone responds well to change. As a result the **people** who use your CRM system are often the biggest challenge to a successful CRM project.

They don't use it!
They move around – so access is challenging.
They change their mind frequently – so the system is judged to no longer be "fit for purpose".

More importantly these people are often professional communicators: **Quick to alert** anyone who will listen to their perceptions of the failings in the CRM system. **Slow to acknowledge** their responsibilities in addressing those problems.

So as you can see CRM selection is not just a review of the latest Gartner or Forrester research. It is a change management project, which benefits from expert guidance.

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If the first challenge is People – then the second is normally **Data**. Even if everyone is committed to the CRM project and is clear about the changes being undertaken, data can catch you out.

Initial population of the CRM system relies on gathering data from multiple sources. Perhaps you're **replacing one CRM system** with another, and the data is simply being migrated. Perhaps you are a new business and are **purchasing data** from a reputable list broker. Most likely you are going to be taking data from a number of places and attempting to populate CRM with clean data.

Every CRM application provides **tools to import** data. Some are better than others at data cleaning or deduplication. Most CRM application marketplaces will have a number of specialist data cleaning products and services. It is unlikely that your choice of CRM software will be made on the basis of addressing this challenge.

It's also worth considering **data access**. Unlike most IT systems the user population of CRM isn't always based in a single location. Frequently they travel widely to do their jobs.

Remote access to data always requires careful consideration. Network access security can be configured easily for fixed or known IP addresses, but the needs of nomadic sales people are less simple. What's more the connection quality is outside of your control. With increased numbers of wireless hotspots prohibiting VPN connections, access is a key consideration.

Modern thin CRM clients can access data through **mobile devices**, but rely on an internet connection that may not always be reliable. For users who travel extensively the challenge is multiplied.

Poor, or unreliable access to CRM is sure to frustrate even the most committed users.

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Beyond connection to the data CRM also provides challenges in terms of the devices that will be used. The old days of the salesperson using a company provided laptop to access CRM have been eclipsed by the increased consumerisation of IT and by flexible BYOD policies. Now CRM data needs to be **accessible on everything** from a smart phone to a watch.

Access is apparently required **anytime** from **anywhere** on **any device** (and yes that does include from an airplane or the underground!)

Back to our "challenging people": Fail to provide access on their device of choice and CRM will quickly become yesterday's tool. CRM users will just **Stop Using CRM** if it doesn't work the way they want on **any device** they chose.

Far from just identifying the challenges – this book wants to provide some **practical suggestions** on **how to select CRM software**. We want to ensure your selection process identifies products that can deliver CRM for your business.

Before we go any further there is one shocking truth that you need to know...

Most CRM software does the same as most CRM software!

Yes, you read that right. Probably 80% of the functionality in one CRM product is available in every other CRM product. The bad news is that without careful research you are unlikely to identify a killer feature that will help with your selection.

Way back on page 6, we discussed CRM in IT terms. We deliberately left out all the Sales and Marketing stuff. The user functionality and the processes supported by the system.

Why?

Because as **IT director**, we recommend you focus on those areas you can directly control. There will be others involved in this project that will have to take ownership of other elements of the project.

What you have to do is deliver a "**platform**". A platform that you are confident works within your broader IT strategy. A platform that is compliant with data governance and security policies. A platform that doesn't restrict the users in developing their vison of CRM.

Even at this early stage we are starting to address the risks associated with people. Together we are beginning the **stakeholder engagement process** - the key element of which needs to be a strategy for CRM in your company. Most importantly, we need the people who will execute that strategy to be **fully invested in its success.**

So looking again at page 6 you will need to answer these questions.

Database – are there any reasons not to go with SQL?
Access – when and where will users need access to CRM?
Administration – who will administer CRM, and what are their skills?
Integration – what systems must we integrate with and how? Web services?
Integration with Office applications – if not, why not? What about email and calendar?
Client application - is there a requirement that cannot be addressed by a web client?
Development tools – are they within the CRM product or can you use existing tools and skills?
Implementation partners – are there any? Is there a choice of partners?
3rd Party developers – do other vendors develop links to the CRM product? Are they relevant to your needs?
BI and reporting – does it work with existing BI and reporting tools?
Process automation – does this only work within CRM or can it drive further business efficiencies by working with other applications?
Backup and security – does it fit with your existing standards?

The answers won't ensure CRM success, but they will ensure that the platform is something you can at least live with.

Now take your due diligence and market research (which identified that most CRM systems do the same) and work with the users to identify the 20% that differentiates each of CRM packages you have shortlisted.

YOUR role in this process is to **guide the stakeholders** in identifying what is **important to them**.

Sometimes it is useful to work with a **mentor** or **guide** such as **Collier Pickard**. Our experience of the CRM market and consultancy packages is proven to **speed up** the identification of the features that will ensure CRM adoption.

Consultancy tools like our **CRM maturity assessment** are great at surfacing needs. Whilst our **STEP workshop** is designed to ensure that CRM is embraced by the whole board. We even have a **Preparing for CRM workshop** that further builds your stakeholder engagement.

So there you have it. A selection of CRM products that fits within **YOUR** IT strategy. A mechanism for differentiating similar products based on business need. Engaged and committed stakeholders.

Depending on your final choice of platform and partner you can instigate an IT project to deliver the platform, and a change control program to roll CRM out across the company.

And that would be the end of the story for most IT procurement projects.

Except CRM is not like most IT procurement projects.

CRM constantly changes. Users will come and go, the way you do business may change, markets and cultures will change. Throughout all this change you will need to **ensure that the platform continues to deliver**. This is why **CRM implementation partners** are an **essential component** of any CRM project.

Where now?

If you want to keep abreast of CRM developments then we're here to help..

So if you'd like more **information** on CRM, here are a few more resources we've created to help you:

eBooks

Videos

Or if you'd like to talk to one of our consultants about your CRM project you can arrange a free, online consultation here:

Consultation

Or if you'd like to sit back and let the information come to you for a while before you make any big decisions, you can connect with us on these social networks...

Or subscribe to our blog. That way you'll receive a steady stream of CRM information that you can dip into as your time and interest allows!

collierpickard.co.uk/Blog

All that remains to be said is good luck with your CRM project!

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