

● *The*
● **Sales Director's Guide**
● **to Selecting CRM**

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Three little letters, one big idea. CRM promises to change the way you **acquire, retain** and **develop** profitable customers. CRM can help you to **improve your key sales processes**, including lead management, opportunity management, forecasting, upselling and cross-selling.

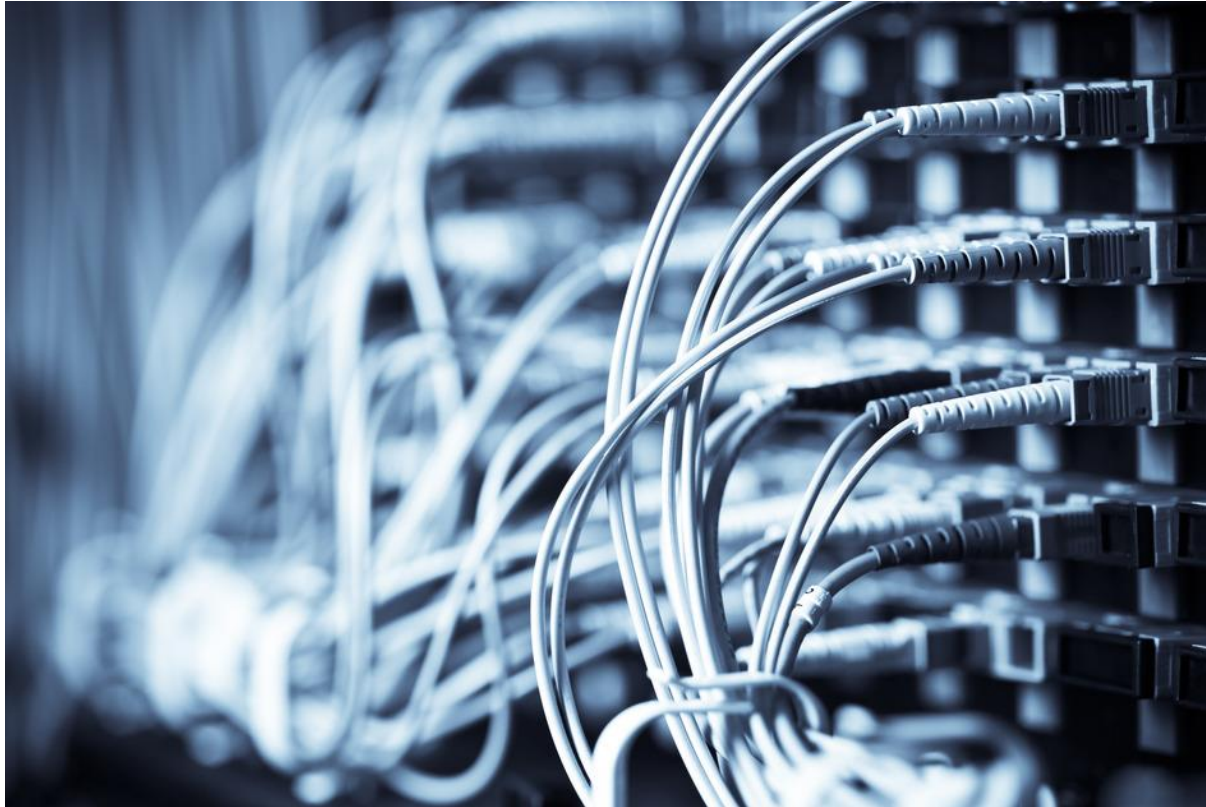
If you are reading this book then it is likely you are thinking about CRM for your organisation. You may be considering replacing current systems, or investing in CRM for the first time.

Before you dive headfirst into the mass of information and product features available we suggest you consider the following.

Perceived wisdom is that CRM failure rates are high but falling.

Research in 2014 suggests that **failure rates have dropped from 68% in 2001 (Gartner) to 30% in 2013** ([C5insight](#)). C5insight also reported that 2nd and 3rd time implementations succeed (or fail) at nearly the same rate.

Your reputation, and that of your business, can be built on a successful CRM project. Failure is no longer the “norm”. However, success is more than just implementing some CRM software.

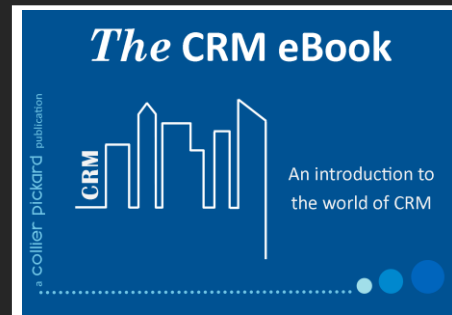
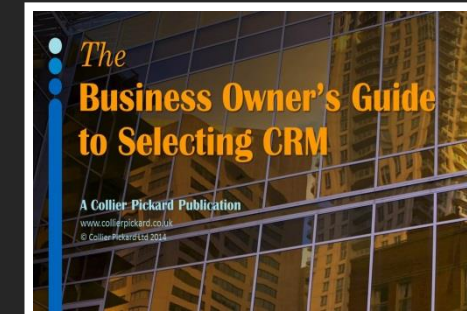
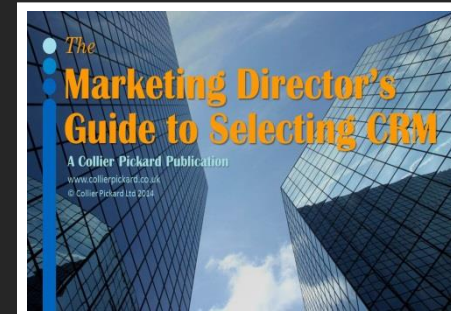
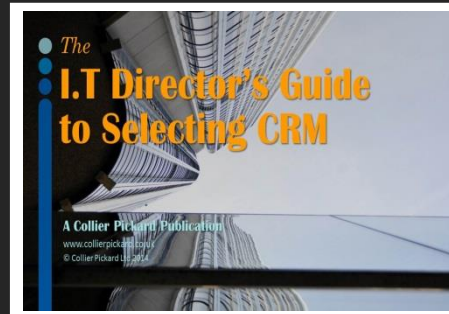
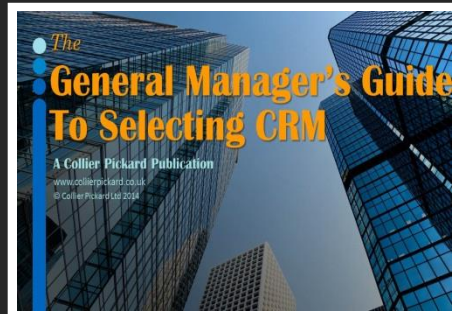


We'll assume that you have already completed some basic research on CRM. That you have understood that **Customer Relationship Management** concerns everything your organisation does to acquire, retain and develop profitable customers.

(If you are still looking for a simple concise guide to CRM then you may find some of [our other guides useful](#))

This guide will strip away product features and sales messages from vendors. Instead we will try to highlight the challenges, and provide practical guidance on **CRM selection from the Sales director's perspective**.

This way you can ensure that the CRM platform meets your needs, not just those of the [IT director](#) or the [Marketing director](#).



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](#)

The Business Need: Sales Directors

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The profession of selling has changed more in the last 10 years, than in the last 100. Independent of your company, or your sales plans, your customers have evolved.

Welcome to the world of Customer 2.0. This is the world where the **customer is better informed** and has access to more information than ever before. Sometimes **more** and **better information** than you or your sales team. Any informational advantages that you had in the past have been negated.

Now is the time to reappraise your sales playbook. Time to think again about how your team sells. In some cases it will be back to basics, in others it will require mastering the new dynamics of selling.

CRM needs to help

- **Manage the process**
- **Manage the pipeline**
- **Manage the team**
- **Manage the managers**

Get it right and you will once again be managing customer relationships – not merely responding.

As you're thinking about CRM for your business, it makes sense to consider your "**customers**". Think of the journey they take when dealing with your business. How did they go from suspect, to prospect to customer, or even to advocate? How did they traverse the continuum which goes from "never a customer" to "always a customer"? Consider the following:

*"As a customer, I want **you** to make it easier for me to buy from **you**, and I want **you** to help me to **buy more from you**".*

This is simply successful CRM. It **reduces the time and effort** a customer wastes when buying from you. This in turn directly benefits their bottom line. It **helps your customers to reduce the number of suppliers they deal with**. This further increases profits – yours and theirs!

To succeed, your CRM project must help move **more customers** through a process, and/or help **improve the process**. CRM does this by improving:-

Efficiency (doing more) and/or **Effectiveness** (doing it better).



One of the oldest truths of selling is that “**most customers don’t know how to buy!**”

The internet delivers information at the touch of a button. Your customers and prospects access product facts, and reviews independent of your marketing departments output. They can hear from competitors, and your former clients. They can inform themselves from a huge range of sources.

All this information can lead to **analysis paralysis**. So much information that the **client cannot make a decision**.

The profession of selling needs to change. The role of a sales person today is to become a **trusted advisor**. Selling needs to deliver value to the customer, even before they are a customer.

Consider the following:

“Digital Body Languagewith customers increasingly accessing information on the web before even talking to a salesperson, companies can dramatically improve their lead funnel by combining a wide range of information about customer activities with insights into what their customers are clicking on. This can include which pages they visited or documents they downloaded from the company’s web site, as well as social media activity on sites such as Twitter and LinkedIn.” **Harvard Business Review The New Age of B-to-B Selling 2014**



Helping Sales People to Sell

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“Your sales people face an interesting problem: **they spend most of their time not selling**. The majority of a salesperson’s time is actually consumed by the day-to-day tasks of finding contact information, updating accounts, and entering data.”

Salesforce.com– “10 Dreamforce announcements that will shape sales in 2015”

Research from CSO Insights confirms the issue:

“Nearly **59%** of a salesreps time is spent on **tasks other than selling**, such as prospecting, administrative tasks, meetings or training.”

Using the CRM system to **record data** can be one of those things that keep your sales people **away from selling**.





What happened that made **reporting** and **recording** more important than doing?

Back on page 3 we suggested that CRM should help you to Manage the Process. Sometimes that message can get lost. Sometimes CRM seems to be more about managing the data, than managing the outcomes.

To ensure that your CRM project doesn't fall into this trap – start with a clear **Strategy**. Use that to define the **Tactics**, which in turn dictate the **Execution** tasks your sales people undertake. Only once you understand the Execution tasks are you in a position to **evaluate CRM software Platforms**.

This approach is so successful we gave it a name. We call it **S.T.E.P.** For more information [click here](#).

Providing a clear direction for Sales within your company requires that you are able to delegate to others. While you concentrate on the next half year, and beyond, **your managers are responsible for the current month and quarter.**

So what do you, and your managers, need in order to manage?
Information.

Consider the following:

“The key challenge to meeting sales goals is insufficient or inadequate information.”
2013 study of 206 sales organizations conducted by the Aberdeen Group.

CRM can collect and present data, from multiple sources, in a single application. But then so can Business Intelligence (BI). Therefore CRM has to do more. **CRM has to provide not just insight – but actionable insight.**

The challenge is to identify the actions that you, your managers and your sales people should take. When they should take them, and what outcome you should expect.



If your CRM system is only providing information, then it is missing two thirds of the story. We often describe this in terms of:

- [Operational CRM](#)
- [Analytical CRM](#)
- [CRM Best Practice](#)

Your choice of tool should be informed by **the needs of your management team**. Aligning how you manage them and how in turn they manage their team can be a major headache. Often managers tend towards managing opportunities or customers not managing sales people. Helping them to think about different ways of managing often **increases efficiency** across the team.

We call this Managing through CRM – For more information [click here](#).

Managing By Exception

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Key performance indicators (KPIs) evaluate the success of your business, or of a particular activity in which it engages.

Often success is simply the repeated achievement of operational goals. Sometimes it's defined in terms of making progress toward strategic goals. Choosing the right KPIs relies upon a **good understanding of what is important to your business**. This often depends on the department measuring the performance - the KPIs for finance will differ from those given to sales.

CRM should provide **instant access** to your sales KPIs. Ideally through easy to understand **dashboards**. Remember that bit about actionable insight? Check whether the dashboard takes you directly to the underlying data in CRM. The best do.



Managing By Exception

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If CRM is truly to become “**the way we do things around here**” then your dashboards cannot be tied to your office computer. Check that CRM dashboards are **available on mobile devices**.

When your KPI's and your processes are aligned then you can create **business alerts**. These emails or text messages can forewarn you of any future potential problem.

The key to making these work is consistent, accurate, trusted data, and processes.

How you get there comes down to something we call CRM maturity – [click here for more information](#).

The Elephant in the Room

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At the beginning of this eBook we trumpeted the improving success rate for CRM projects. One reason often cited for this improvement is the **increased use of hosted or cloud based CRM tools**.

Hosted CRM systems are run on servers operated and maintained by **third parties**. They don't rely on your IT department for their ongoing management. Access to your CRM is through a browser on your PC, Tablet or Smart phone. In the best examples this **reduces training time**, as most people know how to click around a web page.

So why don't sales people use CRM systems? Let me suggest 2 reasons:-

No part of the CRM solution is required for success. Users of the solution can slip back into old habits without losing their ability to perform their core job function.

Your leadership team is not committed to the success of the project. You and/or your managers are unwilling to lead. In some cases, directly contributing to the failure of the CRM solution by requiring the users to re-key information into Excel or other systems.

There are other reasons, but these 2 between them account for the majority of those CRM project failures.

Incredibly they are things that only **you** can fix. Problems only **you** can prevent.

So What's The Solution?

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CRM can be described as a **system** that supports **processes** that reinforce **customer centricity**. Before buying any system it is essential that customers are at the centre of your thinking. For some, this represents a huge change in the way they acquire retain and develop customers.

The problem was right there on page 3. Whether you change and put the customer at the centre of everything you do, or not , your customers have already changed.



So What's The Solution?

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Without a CRM strategy you cannot keep up with the increased competition that the web has unleashed. Foreign competitors, without your cost base, are just an email away. Customers no longer accept pricing obfuscation. The internet has empowered customers in ways unimaginable to many. The only response is to change, and change fast.



With a CRM strategy you have the commitment and a plan to change. CRM software is one tool to help with the change process. [CRM consultancy](#) is another. Together they combine to build a better selling machine. Together they give you a chance to compete.

The Sales Directors CRM Questions:

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If you are researching CRM solutions then the **following questions** will help in your selection process:

- Do I have a clear CRM strategy?
- Do we have the right I.T hardware?
- Can I (and will I) use the proposed system?
- Can a CRM partner help me develop my strategy?
- Does that partner have experience in my industry?
- What percentage of the total CRM cost is software?
- What KPIs will confirm that CRM is working as expected?
- Who can run the system? Are internal IT people required?
- Is there a clear process for understanding my business needs?
- Can the system be access anywhere at any time on any device?
- Does the solution help me read my customers digital body language?
- Can the CRM system be implemented quickly and changed as needed?
- Does that partner have consultants with a track record of success in sales?



Hopefully you now have clarity on your CRM strategy. If not remember our [Managing through CRM](#) and [STEP workshops](#). We can help. As an **independent CRM consultancy** we have the people and the experience to help develop and refine your CRM strategy.

It is essential that you communicate that strategy clearly and consistently throughout your organisation. Getting the buy-in of some people will require hard work, while others will instinctively understand the benefits.

Only when you have the **whole company committed to the CRM strategy** should you proceed to the next stage. Selecting the CRM platform, and implementation partner.

Most CRM software – does the same as most CRM software!

Rarely do product features, no matter how “cool”, influence CRM success by more than a very small percentage. What can improve your chances of success is an **experienced** and **expert partner**. One recognised by the software authors as having achieved the highest levels of certification. One with a track record of relevant successful implementations.

Once you have selected your **partner** and **platform** work with both of them to deliver the solution your business needs. Be prepared to be challenged on “how to do things”. Think about their suggestions, and ask yourself “Does this suggestion help me to achieve my CRM strategy?”



What happens Next?

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With the support and guidance of your **CRM partner** you'll deliver the first phase of your CRM platform. Smart businesses think of CRM in terms of multiple small manageable phases. Their businesses don't stand still – so neither does their CRM platform. Small phases with clear objectives and deliverables, deliver change at a pace the users can easily adopt. They reduce the risk associated with any Business Change project. Importantly small phases deliver a rapid return on investment.

CRM has the power to change your business. That change comes with a cost. Those costs are not limited to software, and consultancy charges. The ongoing operation of any CRM system requires a budget. Time, money and people are required to ensure that the CRM platform continues to deliver.

On page 6 we talked about CRM allowing you to do more (efficiency) and to do things better (effectiveness). For CRM processes to be efficient and effective they rely on data. If your data is poor, then the process cannot be fully efficient and effective. In the worst case you can do the wrong thing, very quickly!

Plan to commit money, people and time to data quality. Perfect data can be prohibitively expensive. We recommend that you decide on what quality of data you need, and how you will maintain the data. This will guide you in the resource required.

Where now?

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CRM is a journey. We hope that you select us to be your guide. We are passionate about CRM and what it can do for businesses, and their customers. You can see our passion in our thought leadership, blogs, and events.



eBooks



Videos

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!



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