CRM Success: 7 Pitfalls To Avoid

Avoiding User Acceptance Issues

One of the biggest issues facing companies that deploy a new Customer Relationship Management (CRM) system is user acceptance. This document outlines what we see as the top seven reasons why user acceptance is still a big problem for so many companies. The decision to purchase and deploy a CRM system is usually based on solid business logic. But once the decision has been made to deploy, many projects go off track. Here are the top reasons why.

Lack of Executive Buy-In

Sure it was a Senior Director or the CEO of the organisation who came up with the idea to deploy CRM in the first place, but these people are seldom actively involved in the delivery. The best solution is for executives to actively participate in the system implementation. By rolling up their sleeves and spending time on the project, they can avoid nearly all of the pitfalls.

The System Is Not Designed With Users In Mind

Managers, the consumers of information from a CRM system, are typically the decision makers when it comes to system selection and customisation. But the real users of the system are the sales, marketing and customer support staff who must enter and manage information. Often little or no thought is given to the needs of these users and the system deployed often does not meet their needs. Ultimately, a CRM system should make users more productive. But all too often the new system is perceived (correctly or incorrectly) as additional work for already busy employees.

Lack Of Training And Orientation

We have learned over the years that there is no such thing as too much training. Training increases comfort with the system, allows users to become more efficient, and overcomes reluctance to change. But few companies invest adequately in training.

Managers Are Not “Living In The System”

When managers do not rely on the information in a CRM system as the “gold standard” for decision making in the organisation, how can they expect end-users to take the system seriously? By conducting the daily operations of the organisation through the CRM system, user acceptance is reinforced, data quality improves, and decision making becomes more efficient and accurate.

Poor Data Quality

At the end of the day, any CRM system is only as good as the data in it. During deployment, many companies migrate legacy databases from multiple sources, create large amounts of duplicate data, and don’t take the time to “scrub” data so that it is valuable and meaningful to users.

Not Keeping It Simple, No Eye On The Bigger Picture

Most CRM projects start off with good intentions but end up becoming bloated with lots of features, functions and ideas that, together, miss the orginal intentions. It is important to keep it simple at the beginning and grow slowly as users get used to, and adopt, the new technology. Conversely, keeping things too simple, or focused, can mean that the wrong CRM system is purchased and the organisation ends up with several fragmented systems. In our experience it is vital that a good project delivery plan is laid out from the start which is delivered in easy steps in a very controlled environment where user expectations can be well managed.

Lack of

Project Ownership

A key driver is to assign an internal project ‘owner’ that has global respect and clout with users and managers. Someone who can proactively drive the day-to-day delivery of the organisations operational requirements, someone who has a deep insight into the processes, culture and end user needs and who is able to relate technically with I.T staff and the CRM Vendor. Unfortunately, all too often this role is not considered or users are just too busy to take it on. Ultimately, this creates a stagnating project or leaves the CRM vendor to make its own assumptions.