



Straight Talk:

Achieving Business Value with Dynamics CRM/365

The CRM road is littered with deployments that are functional failures and that don't meet value expectations. We see it all the time. In fact, a good part of our business is fixing deployments that have been designed, installed, and rolled out by others or internal IT teams.

By the time we get involved, CRM usage and satisfaction has dropped significantly, and management is hesitant to invest any further in the current system. Perceived solutions range from fixing just a few items to replacing the system completely. Insights from a professional will help make the cause and solution clear.

It is wrong and risky to consider CRM subordinate to other essential business applications. With its potential to improve customer engagement and enable sales, marketing, and service success, CRM deserves the same level of attention, planning, deployment, and investment as an ERP system or purchasing a new machine for the plant floor.

A manufacturer buying a new machine knows how much that machine will produce every shift and every hour. The expected business value of the purchase is clear to everyone and if the machine stops operating properly, everyone would prioritize fixing the problem. CRM should be thought of in the same manner with measurable guardrails and organizational awareness of the value it contributes.

DEMAND TRANSPARENCY

Organizations considering a new CRM purchase or evaluating the disappointing results of their current system will benefit from understanding buyer-seller dynamics and by recognizing how they may be sabotaging their own success.

In "The Prime Solution: Close the Value Gap, Increase Margins, and Win the Complex Sale," renowned strategist and advisor, Jeff Thull, asserts that buyers and sellers unknowingly collude in ways that create a value gap for a solution. Over the years we have seen this play out and doom many a CRM project to failure.

KEYS TO CRM SUCCESS

Both buyers and sellers are responsible for a successful CRM implementation. Consider the following and do your part to ensure a positive outcome.

- Accept that self-diagnosis doesn't work.
- Let a professional guide the process.
- Understand what CRM really is: 20% technology, 40% process, and 40% people.
- Recognize that CRM is a sophisticated solution to complex business issues.
- Embrace the need for a comprehensive implementation plan from the beginning.
- Define your business goals and expected value for CRM.
- Remember that CRM is a journey, not a destination.

Buyers sometimes act against their own self-interest by resisting recommendations for up-front analysis and design, integrations with other business systems, and ongoing support agreements. For their part, sellers often focus on CRM's features and benefits without being forthright about the hurdles and risks the customer faces in achieving value. Often, the deployment lacks a clear timeline with measurable goals spelled out.

Although both sides are responsible for the success or failure of CRM, much of the responsibility lies with the CRM reseller. Why? Because sellers have far more experience deploying CRM systems than buyers.

DON'T SHORTCHANGE SUCCESS

The last thing a buyer needs is a seller that tells them what they want to hear, minimizing the joint effort needed to deploy CRM correctly, avoiding frank conversations about changing employee behaviors, and allowing buyers to circumvent business process transformation. These actions waste time and money, and sacrifice CRM's business value in order to make the sale.

Sadly, there are many such sellers out there. They take the easy way out by yielding to buyers that demand an "out-of-the-box solution" or who resist internal change. Buyers contribute by insisting that they'll figure out and make changes later when they understand CRM better, but later rarely comes. When it does, CRM is already labeled a failure because it doesn't meet the user's needs or is seen as not providing true business value.

Although buyers often blame the software and the project team for CRM's failure, in over 27 years of deploying CRM, only once have we found the software to be at fault. Sellers for their part blame the buyer for not doing things right from the beginning, even though they didn't insist on it or provide a roadmap for success.



CHOOSE A TRUSTWORTHY BUSINESS PARTNER

Sellers have a fundamental responsibility to educate buyers and accurately discuss every aspect of CRM, from initial implementation and training to ongoing process changes and the importance of user and strategic support.

Conversely, buyers have a responsibility to choose a seller wisely and trust the seller's expertise. After all, an organization desires to buy a CRM system once. An experienced seller has deployed hundreds and knows how to apply the CRM's features and intricacies to meet the buyer's needs. Buyers will know they have found a trustworthy seller if they insist on applying best practices and implementation processes, and develop a written roadmap for how CRM will mature within the organization.

CRM is a journey, not a destination. If sellers are doing their job, they're working with buyers to establish and measure the short and long term business value of CRM. An experienced and trustworthy seller knows that this mindset is essential for CRM adoption and success, and effectively conveys this perspective to its buyers.

EMBRACE CHANGE MANAGEMENT

Change begets change. When new systems are introduced to any part of an organization, processes and behaviors must change to take advantage of new opportunities for success. This is especially true when it comes to people and the processes they use to do their jobs.

Because CRM is 20% technology, 40% process, and 40% people, a clearly documented change management plan is an essential part of its deployment. Users at every level cannot embrace CRM without fully understanding how their behaviors and processes will align to CRM to ensure individual and organizational success.

Buyers and sellers often talk about these changes, but they won't happen by themselves. Success is only possible with a written change management plan that spells out what's changing, how it will be monitored, and how user compliance will be measured.

User acceptance is not just a by-product of a well-designed user interface. It is achieved by recognizing that users have different requirements and abilities, and delivering a solution that improves productivity by meeting each group of users' unique needs. A change management plan can help users understand how those changes help them succeed. When they do, adoption is organic, while CRM value improves.



Organizations that resist the challenge of behavioral and process changes are sabotaging the potential benefits of their chosen solution. Insisting on "business as usual" is a sure way to derail CRM's ability to increase sales, improve customer satisfaction, and streamline the sales process.

A SUCCESSFUL MINDSET

Never underestimate CRM's impact on your business. Its success depends entirely on how well it is planned and implemented. Remember that CRM is a journey, not a destination and that it requires an ongoing commitment. Organizations that are serious about achieving optimum results don't take shortcuts that save a few dollars in the short run.

If you have a CRM system that isn't living up to its promise, compare these guidelines to your mindset at the time CRM was deployed. With these attitudes and experienced guidance, it's never too late to turn things around and make CRM integral to your organization's success.

- **Collaborate to Understand CRM's Capabilities.** Don't limit CRM's success by thinking you know everything about its functionality and agility. As the saying goes, you might not know what you don't know. Rely on a strategic advisor before making a change, and seek out their insights when diagnosing how core business problems can be solved using CRM.

Think of it this way. If you're experiencing chest pain, would you self-diagnose by going to WebMD or seek professional help? Likewise, if CRM isn't delivering value, it's best to rely on your CRM partner instead of IT support. IT may be good addressing break-fix items, but your partner is better able to provide the strategic insight needed to drive business value.

- Work with an Experienced CRM Partner. Look for a professional with deep CRM experience and lots of deployments under their belt. Then choose someone who will work with you now and in the future to ensure your short and long term success with CRM. A good partner invests the time to understand your business, deploys experienced resources to support your organization, proactively anticipates future needs, and coaches users to improve ROI.
- Understand the Nature of CRM. A CRM system is 20% technology, 40% process, and 40% people. It is a multi-faceted, integrated solution to complex business issues, not one-size-fits-all software you can simply download. CRM is not like word processing or spreadsheet applications that can be installed and run with little attention. With people and processes comprising 80% of your success, it's unrealistic to achieve the business value you expect from CRM by simply watching the software publisher's YouTube videos.
- Plan for Success. There are no shortcuts. Start with a comprehensive written plan that defines the business value you expect to receive from a CRM deployment. The plan should align people, processes, and technology with your organization's goals. Be specific about how success will be measured, and be realistic about how long it will take to achieve.

And be sure to roll out CRM in phases. It's not possible to accomplish everything at once, and you don't want to overwhelm users or threaten adoption. Expect that the plan will change along with changes to your organization and business environment. As a result, the plan should be reviewed and updated annually, continually rooted in the business value expected.

CRM SATISFACTION

InfoGrow is dedicated to helping organizations implement and embrace Dynamics 365/CRM solutions. We believe in honesty, transparency, and collaboration, and are dedicated to making CRM a vital part of your business.

Before moving forward, we conduct a free 90-minute workshop to help us understand your business and to help your managers understand CRM's potential and the necessary changes it brings. We follow up with professional support services that empower leadership and end users alike.

No other CRM reseller offers a "No Results Missed Pledge." Just like you, we expect CRM results that fully meet your business objectives, and we remain engaged until they do. Contact us when you're ready to successfully deploy CRM with a results-driven, straight-talking, experienced partner.



ACCELERATING PROFITABILITY THROUGH EXCEPTIONAL CUSTOMER ENGAGEMENT

InfoGrow has over 27 years of experience helping companies accelerate their sales and marketing effectiveness through better decision making.

We help our clients identify their best prospects, discover missed opportunities, focus on their most profitable accounts, and reduce marketing waste. Count on InfoGrow to support your efforts to find more customers and keep the ones you want.

Contact us today to learn how CRM, marketing automation, customer mapping, and membership and event management solutions can improve productivity, streamline processes, and close more deals.

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