Top 10 Things You Must Know Before Implementing CRM (Customer Relationship Management)

PEAK Sales Consulting, LLC specializes in working with business executives to develop and implement business and sales processes. Our focus is to help sales managers improve revenue, reduce sales cycles, generate predictable forecasts, enhance lead flow management, develop meaningful management reports, create superior sales metrics, and produce exceptional sales results. PEAK Sales Consulting's methodology provides the framework for aggressive and sustainable results in sales effectiveness.

Our services help sales executives and their teams to:

- Accelerate sales growth
- Improve the results of individual sales reps and sales teams
- Increase closing ratios by improving conversion rates
- Identify and leverage best practices of sales reps and sales managers
- Reduce ramp-up time for new sales professionals
- Help transition to a solution style of selling
- Provide accurate forecasting procedures and useful management reports with minimum resource expenditures
- Become a World-Class Sales Team!

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1. **Make sure your goal is to target the solution for the Customer.** Using CRM to simply solve your company's problems is not sufficient. The "C" in CRM is for Customer. So make sure their needs are addressed first and foremost.

2. **Develop a Plan.** Implementing a CRM solution without a plan is like trying to build a house without an architect. You can have all the best tools money can buy, but without a good plan, you won't know what to build.

3. **Prioritize.** Avoid the temptation to do everything at once. Make a list of your business needs, then prioritize them according to the most important and largest payoffs first.

4. **Engage Management Support and Ownership.** You can't do this alone. You must have senior management behind you all the way. A project champion at a senior management level should be your objective.

5. **Pilot the Program.** Test your CRM implementation before going live. This will help get the kinks out and allow you to make final adjustments prior to show time.

6. **Roll It Out In Phases.** Do not roll this out all at once. It will completely overwhelm your users. Feed it to them in small doses.

7. **Train! Train! Train!** You cannot train your people enough. Without training, the product and processes will not be used correctly, or at all. Always follow up with on-going training as well.

8. **Get User Buy-In.** To ensure users embrace the change and actually use the new system, make sure you have their understanding, support and buy-in. Make sure they understand the benefits they will get from using the new system.

9. **Monitor It Closely and Continuously.** Keep a close eye on how the rollout is progressing so you can monitor its success and make necessary adjustments over time. Do this continuously.

10. **Fund The Project Adequately—Don't Skimp.** If you cut corners or don't budget enough, something will be sacrificed that will jeopardize the success of the project. Understand the full costs upfront, then fund it accordingly. Don't step on dollars to pick up pennies.