



FIVE CRM MISTAKES & THE FIXES YOU NEED TO KNOW

- 1.** Choosing a system without involving the end-users: Many companies assign the IT or sales teams with selecting a CRM system. While that sounds fine, there are other people in the company who will rely upon the CRM system. This includes customer service, marketing, and perhaps a separate call center who will update the system. Invite representatives from each end-user department to the table to review the spec documents for the CRM project, and involve them in the vendor selection process. The more you can involve everyone who will eventually use the system in the choice of the system, the more invested they will feel in its success, and the more likely it is that they will be enthusiastic about the system.
- 2.** Choosing a system that isn't mobile-friendly: The sales team is constantly on the move, visiting clients, traveling to meetings, and working from planes, trains, and automobiles. As a result, they need a CRM system that is mobile-optimized and can work in a wide range of situations. Choose a CRM system with a mobile, cloud-based approach to ensure maximum flexibility and ease of use. Salespeople are easily frustrated by systems that aren't accessible when they have the time to update their records. You'll see a higher compliance and use rate with systems that are easily accessed through the internet from a variety of devices including tablets, laptops, and smartphones.
- 3.** Choosing systems that aren't scalable: Another mistake companies make is choosing a system based on current requirements without considering future needs. Although it may seem unlikely that business will double or triple in the next year, it could, and if it does, will your system scale accordingly? Additionally, will you want to add other software to maximize efficiency? Flexible, modular, cloud-based systems can scale to your business needs. Software from reliable, reputable companies is also built to work with other products in the Sage family so that you can add functionality as needed.
- 4.** Forgetting about social media: Social media isn't just for sharing funny cat pictures or recipes. Today, it's an important business communication tool and essential for customer service. CRM systems must interact with major social media sites in order to reach the maximum number of customers. Ensure that yours can handle all of the channels that your company uses routinely to update customers and market its products.
- 5.** Inconsistent nomenclature: Before launching your CRM system, sit down with all of the end users and decide upon important terminology. Account classification, customer types, and other data fields must be named consistently, and all users share an understanding of the definition for each type. Without this, your database will quickly become an unwieldy conglomeration of information without rhyme or reason. Then more time and effort must be spent to clean the database before reports can be run with any assurance of accuracy, and it is difficult to integrate the data with other systems. Create a data dictionary that defines all business terms used in your CRM system. This data dictionary will then guide users as they input information into the system.