



7 Dangerous Pitfalls to Avoid During Your CRM Implementation

You've probably heard the promising statistics: the average return on investment (ROI) for a CRM platform is \$8.71 for each dollar spent. The most effective sales organizations are 81 percent more likely to be using a CRM platform. A full 74 percent of CRM users say their platform has given them better access to actionable customer data. In light of numbers like these, it's no surprise that 70 percent of businesses are increasing their investments in CRM technology.



But no CRM platform is going to deliver the results you're looking for – at least, not all on its own. The value you get out of your software depends almost entirely on your CRM implementation process, and the strategy with which you roll out the platform throughout your organization. So before you purchase any top-notch tools, make sure you've walked through the checklist of steps necessary to secure support, both from the vendor and from the software's users at your company.

Here are seven CRM implementation pitfalls to avoid, in order to make sure you get the full benefit of the functionality your new software has to offer.

1. Failing to pinpoint specific problems that your new CRM solution needs to fix

Before running out to buy a powerful CRM solution, you first need to understand precisely why you need one, and which specific problems you want it to help you solve. Far too many decision makers forget this all-important fact – and as a result, they may purchase the wrong CRM platform for their organization's needs, or fail to get it adopted widely enough to generate a worthwhile ROI.

Whether you're struggling to close deals, discover new prospects, streamline your sales pipeline, automate your email marketing, or handle hundreds of other related tasks, a CRM platform can deliver the results you're looking for – provided you start with a clear list of the issues you aim to fix, along with a roadmap for how a new CRM platform will help you address those problem areas. This understanding will also guide your decisions, as you investigate the increasingly wide range of competing CRM platforms on the market today.

And internally, a solid understanding of your goals will help you clearly communicate the need for a new CRM system, up and down the chain of command. You'll be able to confidently answer questions from change-resistant members of your team, by explaining exactly how a CRM platform will support their activities and streamline their most labor-intensive processes. Plus, you'll have a set of talking points to take upstairs to management, in order to secure the buy-in you'll need to move forward effectively.



2. Forgetting to secure buy-in and ownership from team leaders

As with any major operational change, a move to a new CRM system is going to generate some friction within your organization – and if that move lacks support from the boardroom, then all your ambitious CRM plans may be dead in the water. So before you spend a dime on a CRM platform, it's essential to make sure you've got buy-in from the top down.

This doesn't just mean the executive team – it's equally crucial that team managers and lead salespeople take ownership of the new CRM workflow, and advocate its adoption among their team members. And after all, managers have the most to gain from CRM software's efficient pipelines, centralized communication dashboards and intelligent analytics. The more clearly they understand these benefits, the more enthusiastically they'll jump on board.



Plus, some change-averse team members will inevitably raise questions about costs, learning curves, and shifts in priorities. With managers on your side, you'll be able to address those concerns in ways that relate to each team's practical challenges on the ground, and explain how – after a brief period of training – the new CRM system will make their lives much easier.

3. Choosing a vendor that won't work by your side during rollout

A new CRM system is not just a one-time purchase. Since no two businesses use their CRM platforms in quite the same way, each platform requires some customization to fit the workflows for which you'll be using it. So once you've bought the initial license on your CRM software, you'll want the vendor who's willing to work with you during implementation and rollout, in order to make sure your system gets set up and customized around your business's needs – and in response to requests from managers and team members.



Beyond that, you're going to need a CRM system that can scale and expand as your business does. You're guaranteed to need additional functionality in the future, as your business increases its customer base, enters new verticals, and adapts to changing market conditions and emerging technologies. Your CRM vendor needs to make a compelling case for their ability to adapt around your business, and to scale smoothly over the coming years.

Not all CRM vendors provide this level of support – which is why it’s vital to perform due diligence on any vendor you’re considering. Make sure they’re willing to work with you to provide features and customizations requested by team members, and to add further functionality as you need it. Ask for references from the vendor’s existing customers, and for referrals from colleagues in your industry. A higher up-front cost may be worth the investment.

4. Failing to fully integrate your existing communications into your CRM platform

You’ve chosen and vetted a new CRM system, secured buy-in and ownership from team leaders, and gotten the software set up and customized around your teams’ workflows – which means you’re well on your way to realizing a return on your investment. Even so, you’ll never get much value out of your CRM system unless you take concrete steps to place it at the center of your business’s customer-facing activities.

One of the most straightforward ways to achieve this is to integrate your CRM system with as many other key systems as possible. For example, companies who integrate their email systems into their CRM platform cite year-over-year revenue gains of 22.7 percent. Similar numbers apply for integration of phone systems, support tickets, social media posts, and other digital communications that were once handled in separate departmental siloes.



The more you’re able to bring all these data and lines of communication into your CRM platform, the more clearly managers will be able to see their teams’ activities, pinpoint inefficiencies, and measure improvement in response to changes. And by making your CRM dashboard an integral part of each team’s daily workflow, you’ll help them become more comfortable working within it, until they start to reach for it instinctively, whenever they need to perform any type of outreach.

5. Not taking proactive steps to organize your workflows and customer data

These days, just about every industry is obsessed with “big data” on customers and industry trends – but it’s equally true that “big data is dirty data.” In other words, your existing data on customers and sales pipelines is likely stored in a wide range of legacy systems. Much of it is probably in incompatible formats, using inconsistent fields and labels. Many entries may be missing or incomplete.

In order to tap into the true power of your new CRM system, you’re going to need to get that data cleaned up. Some companies hire data specialists to handle this time-

consuming task – and if your organization has millions of customer records reaching back decades, that may indeed be the most practical option. However, some data cleanup operations can be handled by temps and interns – and once all the data is organized along consistent templates, it should be easy to import into your CRM system.

As much of a time-suck as data cleanup is, it'll deliver ROI for years to come. Centralizing and standardizing your customer data will bring together insights from every department into unified 360-degree customer profiles. These will prove immensely valuable as you progress toward delivering consistent, personalized customer journeys across all communication channels.



6. Forgetting to establish your own clear metrics – and to understand their context



Just as it's pointless to purchase a CRM system without understanding the problems it'll fix, it's equally useless to roll out a new CRM platform without any clear benchmarks for improvement.

Many CRM systems include powerful tools for tracking deal timelines, email campaign performance, and other key metrics – but metrics alone do not equal insights. You need to know which metrics are meaningful to your organization, and how each of those metrics correlates with the concrete goals you aim to achieve.

Before you roll out your new CRM platform, work with team managers to develop clear metrics for the software's impact on key business activities. These metrics will be different for each organization, depending on the statistics that tend to correlate most strongly with closed deals and increased revenue. You might want to track time spent selling, lead response time, average deal size, and a range of other stats, in order to pinpoint sales bottlenecks. Whatever metrics you choose, make sure you track them consistently within your CRM software, in order to make meaningful quarter-over-quarter comparisons and discover opportunities for further improvement.

At the same time, metrics alone can never tell the complete story. For example, an increase in the speed with which your salespeople close deals might seem like a good thing – but might they have closed even bigger sales if they hadn't felt so rushed?

A boost in email click-through rates might appear to be an obvious positive sign – unless most of those click-throughs fail to result in an actual purchase. In other words, metrics are only meaningful in a larger context. Your CRM software will show you all kinds of numbers, but it's up to you to decide what those numbers mean, and how best to act on those insights.

7. Failing to make your CRM platform a part of your company culture

Far too many companies purchase and install shiny new CRM systems with the highest of hopes – only to have all those expensive, cutting-edge tools sit idle and unused, while teams continue to rely on siloed legacy systems in which they feel more comfortable. In order to realize a return on your CRM investment, you're going to have to implement a proactive strategy to roll out everyday adoption among your staff, across all sales and support teams.

The core of that strategy, of course, should be a practically oriented training program, which needs to be mandatory for all team members who deal with sales, support, marketing, and all other functions that will be handled within your new CRM system. It's equally important that these training sessions be tailored around the functions of each of those departments, rather than trying to offer a one-size-fits-all explanation that doesn't fit anyone's day-to-day workflow.

As you progress through this training, be sure to maintain an open-door policy for suggestions and feedback – in the classroom and beyond. Team members will be much more engaged with the process, and more open to adopting the new CRM workflow, if they feel that you and the vendor are willing to add features and customizations that fit their needs, empower them, and make their jobs easier. And at the end of the day, those are some of the core reasons you're rolling out your CRM platform in the first place.

Once you've got a clear idea of what you want your CRM platform to accomplish for you – and have secured support from managers throughout your organization – you'll be well-positioned to work with your vendor to customize your CRM system, in order to create a solution that will scale smoothly with your business for years to come. And the more diligently you track meaningful metrics within your platform, and use those stats to derive actionable insights that fit your company culture, the more successful your CRM implementation experience will be.

