

Is your CRM a Sales Enabler or a Sales Prevention Tool?



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Customer Relationship Management



CRM from a Sales Growth Perspective

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Many companies are proud of their CRM system, many believe that it has transformed their business, in many cases though the journey to achieving a system that supports the business and performs as expected has been a long and difficult journey.

What does a great CRM give you?

What are the dangers you face when considering or mobilising a CRM system?

Having spoken with many businesses most talk to me about the great information they receive from the system, they talk about the data they can inspect, the activity they can measure particularly of their salespeople. They talk about how it helps their managers manage poor performance.

In my view a CRM system if operated correctly can be a great enabler of growth and this is where I believe the narrative needs to change. I have seen the system used very much as a stick rather than a carrot and hopefully some of my thoughts will generate opinion and conversation.

I have worked as part of a project team in a large global business delivering and specifying a CRM system, taking it right through to a global launch, I have worked with market leading CRM's and small proprietary CRM systems. I have made lots of mistakes and over the years have seen what works and what doesn't work. This article is not a technical discussion or a discussion over CRM providers, I have written this piece to impart some of my knowledge built up over many years from the perspective of a Sales Leader and how to energise your sales teams.

When interviewing salespeople a common question during the interview, is what CRM do you use? The salesperson always seems very excited when you answer, however what is the salesperson really thinking?

Will they manage me through the CRM?

My admin is not one of my strengths?

Oh no! There is no hiding place?

Often a salesperson will have hindering thoughts in respect of the CRM not positive thoughts – as sales leaders we need to change this and the reason for a CRM system in respect of the Sales Team needs to change – it is to help every salesperson grow their sales to their maximum potential, giving them competitive advantage to sell more...

Through this article, I will give you my opinion as to the top 5 areas to focus on when running a CRM system in your organisation from a sales perspective. This article is not based around the financials or management information a CRM can provide, it is based on your CRM becoming a Sales Enabler and not a Sales Prevention Tool.

It will draw on years of my experience, the learnings I have made from getting it wrong and of course getting it right. It gives some great tips on how to ensure you set your CRM up for success rather than mediocracy or even worse failure.

The top 5 areas I will focus on is:

1. Design & Build
2. Training & Launch
3. Embedding your CRM
4. Sales Leadership
5. Ownership

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Design & Build

Understand your Objective

Too often objectives at the design and build stage are hijacked across different departments within a business, for example, Finance, Operations, Sales, HR and Customer Service will all have different objectives – be very careful - **COMPLEXITY** is your **ENEMY** in any design and build.

Involve the people who will be using the CRM

This is not just leadership!
Picture the scene, sitting round the table in a hotel in Bangkok with 15 sales leaders designing and specifying of a Global CRM, so many fields, so many * meaning a mandatory fields – this was me 10 years ago getting very excited about a world class CRM – what we delivered was a sales prevention scheme – we were like children in a sweet shop.

Automate

Avoid free text fields where possible and use drop down menus to improve quality and ease of use. Automate wherever possible within any CRM System

Keep it Simple!

- Polarise your objectives
- Minimise the fields you require
- Trust in your people
- Keep mandatory fields to a minimum
- Challenge the 'As Is' processes
- One Customer View
- One Organisation
- It should make growing easier!

Training & Launch

Managing Expectations

Having a CRM Operational Model and a CRM Launch will not deliver any business a great CRM system. When training and launching a CRM into your business, understand that it is an evolving piece of software and your people will evolve with it. At the outset you must create a safe place to allow people to ask questions, make suggestions and develop the system.

Launching your CRM is the start of a Journey

I have seen businesses including my own team deliver a spectacular launch and 1-day training session and then say over to YOU. This will fail! You must explain and engage. **YOUR USERS WILL MAKE YOUR CRM SUCCESSFUL**

Development Strategy

However well you have scoped your CRM you will need to develop it, change direction and evolve it, engage your team, create user forums, you need feedback positive and negative

Embedding your CRM

Communication

In my experience embedding your CRM to takes time and moving from being unconsciously incompetent to unconsciously competent will involve constant training, constant adjustment and constant challenge. You need it to become part of your businesses autonomous system.

Different People Learn at Different Speeds

Caution is advised at this stage; you will have early adopters and people who are familiar with CRM's, you will also have people who will not understand and will take time to adjust. **Make Time**, a great CRM can be the source of great people retention if embedded correctly, it can also be a huge risk if you do not help and support. Consider a buddy up system, make sure people feel supported and not insignificant or even worse disengaged.

Time & Agenda

Every Sales Meeting, Every 1-1 and every training session should involve your CRM system – refresher sessions, development sessions. These should sometimes be taken by your early adopters. You must get to a position where your team is proud of the system and proud of what they have created.

Sales Leadership & Ownership

The success or failure of a CRM will depend on great leadership and people. You will have invested significantly in a CRM system however its success will be predicated on **10% system / 90% PEOPLE.** I have listed some key areas which I believe are critical from a Sales Perspective:

One Team

When launching or running a CRM system it is easy for great sales leadership to become complacent, the information we receive gives us statistics regarding IT capability, activity, performance and future opportunity. It is imperative that as a sales leader you do not forget the principals of great sales leadership; your role is to help the salesperson in your team to be the best they can be; your role is to take away anything that stops them from being successful; your role is to support, listen and coach them. Above, I refer to 'One team', so often I have seen this erode rapidly when a CRM is launched, a sales leader must work as one with the team to deliver an exceptional CRM.

Vision

You must create a vision of what the future will look like and the reason for launching a CRM system and this must focus on making sure the sales team understands that it is in support of their success. It is about taking away unnecessary work; it is about giving back time in order to maximise growth and sales and in turn increase their earnings. Providing the design and build has been completed correctly administration will be reduced hugely.

The Stick

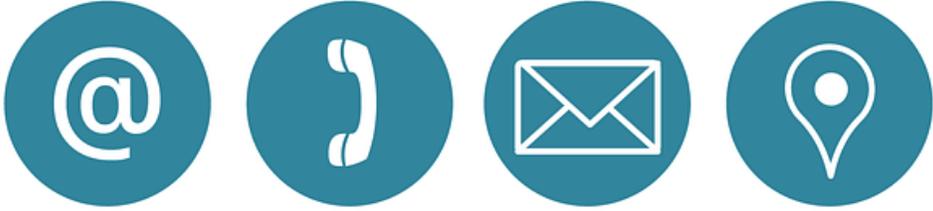
The CRM should be about the Salesperson believing the business is investing in them and helping them become successful. Too often I have seen the system being used as a stick to drive behavioural change – funnily enough this never works! For example publication of overdue leads in the system on a leader board distributed to the entire sales team with a red, amber, green key. Leaders start to try to drive change through blanket information tables. This will demotivate, effect retention and engagement. My message is just because you have a system, do not allow it to deliver poor leadership.

Ownership

If you can create a culture of collective ownership you will develop, engage and drive adoption and sales growth quickly, every licensee should be considered an owner and must have a platform to support in improvements, training and changes. This must be a safe place and there must be no fear of ridicule – every suggestion or idea is good.

Flexibility

Try to work within your CRM based on principals rather than rules, there will be mandatory fields and requirements from a compliance perspective that you will need, however keeping the operating process simple is key, it will work in different ways for different salespeople. Trying to deliver a one size fits all will result in dis-engagement.



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