



## Getting Real – smarter, faster, easier ways to improve your CRM's performance.

Selling is like running a business. Every successful business does a great job of accounting via P/L and balance sheets what are their inflows (revenue) and outflows (expenses). The principals live the axiom 'time is money.' For sellers, their accounting system is the CRM platform. Accounts, contacts, leads and opportunities are a salesperson's debits and credits, and pipeline and forecast reports are their 'financial reports.' In sales, not having a strong CRM platform that aligns to your sales teams' objectives is akin to running your business without financials.

As the economy wavers up and down, little is more important than strong CRM fundamentals.

When a CRM system does not support the buyer/seller journey in an efficient manner, salespeople resort to other tools to manage their business. That could be Outlook to manage accounts, contacts and activity. They might leverage Excel for deal tracking, pipeline and forecast reporting. Successful salespeople always document their opportunities, they simply do it outside of the mandated company CRM platform.

Many reasons will bubble up as to why they do not use the system – too hard to use, takes too much time, etc. – but the fact is if your sales team has opted out, there is no way your leadership can trust your CRM platform as the single source of truth.

Let's get real. Sales reps will not fully adopt and utilize a CRM system unless it helps them close more business, faster and more efficiently. That's their WIIFM.

Most existing CRM platforms require mild to medium changes, along with a strong change management program, to drive real and sustainable improvements. Here's how to start:

1. Run an analysis on your existing system using historical and current data to uncover process challenges and sales behaviors that drive poor adoption. If your data is bad to start with, that's a great thing. Bad data tells a better story than good data.
2. Once you have assessed the platform, bucket what you find into three areas (system, process, people). The system are challenges that need to be addressed with how the platform is setup from page layouts to reporting. Process is related to how your existing sales methodology and processes are integrated into your existing CRM system. People is all about accountability to system adoption and how to have them want to take ownership of doing their part in using the system.
3. Create a business requirements document that aligns to how you do business and how your customers buy. Make sure this fits your sales methodology and processes and document all those requirements. The requirements document should outline what needs to be corrected in each of the three buckets and take a 'keep-it-simple' approach. Salespeople, sales operations, marketing and sales leadership must be involved in building, reviewing and approving the document. This system must be for them first and foremost. Any actions and functionality that require salespeople to do anything in the system that does not help them win more, faster, should be accountable to those requesting the data. If finance requires specific data points to be populated at the account or opportunity levels, give them licenses to the system and they can enter that data.
4. Deploy the requirements document with a trusted partner who embraces a 'keep-it-simple' approach. The partner should have strong system implementation skills, along with proven training and adoption programs that focus on how to help salespeople use the system to make money. Yes, even the training, coaching and adoption must be about the salespeople.

Focus on accountability at the field level with the managers and sales reps. Users must want to use the system and hold themselves accountable to doing just that. Getting real with your CRM system requires some tough decisions. One thing is for sure, if you do not begin to act on your current state, you will never reach your desired future state. Putting the focus back on the sales team and delivering a platform that works for them will drive higher system adoption, data quality and overall ROI.