I’m a CRM Success Consultant

Background in CRM, eMarketing & ‘Business Development’

15 years experience helping hundreds of top firms achieve CRM success

Focus on Client service and CRM Success

Team of more than 100 professionals

- CRM Success consultants
- eMarketing consultants
- Outsourced data quality professionals

A Little About Moi
Chris Fritsch
@CRMSuccess

Not sure why I’m here today

I work with lawyers

- I’m a ‘recovering’ lawyer

Lawyers

- Unwilling to share
- Bad contact data
- Not technology savvy
- Slow to adopt technology
- Impossible to ‘mandate’
- No leadership support
- Busy billing time
- Skeptical beyond belief
- They argue for sport
- They do things their own way...

Why I’m Here Today
The CRM Challenge

- According to respected business research organizations, up to 70% of CRM implementations fail to meet expectations
  - Resulting in a tremendous loss of money, time, resources...
  - and credibility
Reasons for CRM Failure

- Unrealistic expectations
- Failure to assess needs
- Lack of management support
- Lack of adoption by users
- Inadequate communication / training
- Lack of strategy or planning
- Failure to commit necessary resources
- Data quality issues
  and ...

The Most Important Reason

- CRM success is about
  - People
  - Process
  - Technology
    - The problem typically isn't the technology

People Problems

- Not enough time
- Lack of training
- Cultural issues
- Organization politics
- Communication challenges
- Resistance to change
- Aversion to sharing
- Bad attitudes
- Laziness
- Short attention spans

User Attention Span

The Actual Human Attention Span

In 2000, the average attention was 12 seconds
Now it's 8
Our Users

- Busy
- Overworked
- Distracted
- Sometimes a little nuts
- When they get scared, their first impulse is to remain motionless
- But they can also be trusting

Process Problems

A Few Business Processes

- Sales
  - Opportunities
  - Proposals / quotes
  - Contracts / agreements
  - Shipping / delivery
  - Invoicing / billing
- Marketing
- Project Management

- HR / Personnel
  - Hiring
  - Onboarding
  - Evaluations
  - Training
- Service
  - Returns / refunds
  - Support

A Lot of Process Problems

- Complicated interfaces
- Access issues
- Time constraints
- Uncoordinated efforts
- Too many required fields
- Duplicate records
- Information silos
- Duplicative data entry
- Too much focus on bells and whistles

Piles of Paper

- Documents
- Spreadsheets
- Calendars
- Email
- Reports
- Forms
- Notes

- Invoices
- Proposals
- Contracts
- Evaluations

The Good News

Success Is Possible!
Reasons for Lack of Adoption

- No involvement in selection / implementation
- No management support
- Optional participation
- No system ‘ownership’
- Lack of trust in the data
- Too much data entry
- Lack of perceived value
- Bad data
- No ROI

Getting Adoption

- Demonstrate value / ROI
- Solve problems
- Automate processes
- Identify anyone who may not ‘play nice’ in the sandbox

Change Management

- You win the CRM war one battle / person at a time
  - Create pilot group(s)
  - Enlist champions
  - Get users involved early and often

Point People

- CRM manager
- Champions
- Trainers
- Helpdesk
- Data stewards
- Liaisons / key staff members
- Sales / business development support staff

One Key Group

In the immortal words of a Managing Partner of a 700 attorney law firm in the middle of a CRM rollout:

Don’t P#$ off the assistants!
**Commitment**

**Investments**
- Time
- Money
- Resources

**Planning**
- Key areas
  - Selection
  - Rollout
  - Systems integration
  - Data quality
  - Training
  - Communication

**Communication**
- Multiple methods and channels
- Bursts / bullets
- Use surveys to gather feedback
  - Act on it!
  - Implement suggestions
- Share successes
  - Tell stories
- Get their attention where / when you can

**Training**
- Real life data and scenarios
- Different training for different types of users
- Deskside visits
- Accommodate different learning styles
  - Quick reference guides
  - Videos / tutorials
- Lunch and learns
- New hires
  - Initial training
  - Ongoing task-based training
- Certifications / certificates

**Accountability**

**CRM Sticks**
- Make use mandatory
- Require certifications
- Create and enforce rules
- Expense reimbursements
- Performance evaluations
- Tie CRM use to compensation
- Never underestimate the power of Competition

**Incentives & Rewards**

**CRM Carrots**
- Bonuses
- Contests
- Recognition
- Gift cards
- Awards
- Articles
- Praise
Make Process Is a Priority

- People and process first, products second
  - Assess specific needs / requirements
  - Select the right technology
  - Configure the system to meet needs
- Set realistic expectations
- Define measurable, achievable goals
  - Achieve incremental goals
  - Communicate successes
  - Repeat...

Fixing Process Issues
Think Outside the Box

- Involve users
- Ask customers / Clients
- Analyze workflows
- Duplicate detection / data quality
- Reduce data entry points
- Consider alternative systems
- Integrate

To Integrate or Not to Integrate

- First, ask why
  - Communication, coordination, Client service
  - Enhanced user experience or participation
  - Ease of access to information
  - Reduced time spent on redundant processes

Consider Integration Costs

- Implementation
- Subscriptions
- Training
- Staffing
- Maintenance
- Ongoing upgrades
- Data quality

Data Quality

- Up to 30% of data degrades each year
- Bad data can reduce adoption
- There is no magic bullet
  - Data resources are essential
    - Initial and ongoing
    - Outsourced

Processes Improvements

- Views
- Analytics
- Dashboards
- Surveys
- Alerts
- KPIs
- Workflows
- Automation
- Business rules
- AI
The Real Secret to CRM Success

What To Do Now

- Don’t try to boil the ocean
- Start with a plan
- Assess needs
- Set goals
- Find a problem to solve
- Small successes, communicate...repeat
- Don’t do it alone
  - Reach out for help
- Subscribe to CRM Success

Your Mission

Christina R. Fritsch, JD
CLIENTSFirst Consulting

E: CF@ClientsFirstConsulting.com
P: 404-249-9914
W: www.ClientsFirstConsulting.com
B: www.crmsuccess.net
L: http://www.linkedin.com/in/chrisfritsch
T: @CRMSuccess