

SMPS BUILD BUSINESS 2017 CRM ROUNDTABLE NOTES

Thank you for joining us at the first-ever Mind Exchange Roundtables. We are thrilled you made time to discuss CRM with us and your fellow attendees. Our hope is that you enjoyed the interactive session and learned from your peers as we discussed best practices on how to successfully analyze, implement and garner engagement with your CRM system.

Below is a brief recap of the ideas shared. We are hopeful this outline will jog your memory and spur you to action. If you do leap into motion or have already done so, please reach out and share your experience(s) with us.

- **Facilitators**

- [Kevin Hebblethwaite, FSMPS, CPSM](#)
 - » Principal Consultant, Full Sail Partners
- [Courtney Kearney, CPSM](#)
 - » Owner, CKearney Consulting, LLC

- **Overview with Kevin**

- Defining what we want
- Break habits
- Champion
- Control Issues/Territorial
- Administrative vs. Strategic
- Perception
- Trust in the company
- Relevant/Actionable
- Consumer Comfort - "Where's the tipping point?"
- Leverage existing data
- Cycle Management
- Efficiency (ROI)
- Manage pipeline
- Win more work
- Results
- Connect to what we were doing yesterday
- Knowledge Management
- Why did we agree in the first place – Intention
- Efficiency
- Sustain and continue to grow
- Why throw knowledge away
- Prepare for future downturn – don't miss opportunity
- Value doesn't follow market
- What are we doing with overhead/non-billable time
- Capture institutional knowledge/leadership transition (knowledge management)

- **Weeds (Implementation Strategies) with Courtney**

- Implementation team
 - » Representatives from each key area or office of firm
 - » Once these are power users they become office champs
- Have a CRMadmin@company.com
 - » Keeps the Q&A responder a secret
 - » Allows the documentation to stay general so it's not changing with staff changes
 - » Multiple users can have access and share the responsibility/load of answering
- Client champion held responsible for data integrity
- Celebrate successes
 - » Market your CRM to your internal staff and advertise your CRM wins!
 - Send a celebratory email out when all BD have their contacts in the CRM or better yet have an ice cream party to celebrate that major accomplishment
 - » Share the success stories in an internal newsletter / intranet
 - How did CRM help them win a project?
- Get internal champion from PMs, etc. – have them help train
- Small bites
 - » CRM systems are complex and a BIG undertaking, take it small and doable steps
 - » Don't try to do it ALL at once or you will end up with a lot of incomplete parts and nothing complete or done well
- Use alerts to help with data integrity
- Biggest pain point first
 - » Quick wins or BIG wins get you buy-in and provide you precious momentum
- Show value to different groups
 - » What can/do they get out of it
 - » Higher level buy-in
 - » Focus on the why
- Look for areas of duplication (double entry/effort)
- Take time to strategize and map out before getting into the system
- Selective customization based on the user or groups of users "Customize the experience"
 - » What modules they have access to
 - » What permissions they have
 - » The dashboards, widgets and reports they have
- BRIBE users – FEED them
- Remind them of the why and remind them often
- Plug into User Groups / mySMPS network / contact provider
 - » Find a local user group or one you can call into
 - » mySMPS has community groups for the main CRMs on the market
 - » Contact your CRM provider and ask if they have a user group
 - If they don't have one start one
 - Ask for references as those users have good best practices they are already willing to share. They might even be willing to join you in starting a users group.
- Review demos on your provider's website
 - » To review why you purchased your CRM
 - » To see what features you have forgotten about
 - » What your next areas of implementation should be

- Prioritize your implementation
 - » Don't try to be ALL things to ALL people at ALL times!
- Have regular internal training – on-going brown bags (again food is always a plus)
- Executives calling them out for not doing what they need to
- Tie to their review, bonus or reimbursements
- Use system LIVE in meetings
- Bring outside experts
 - » There is something that happens psychologically when an "outsider" says the same thing you've been saying that allows your people to hear and take in the information
- **Contact Us**
 - We would love to hear from you so please reach out!
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