7 TIPS to Maximize Your CRM to Ensure BD Success

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1 Start with the End in Mind

Why do you need a CRM and what do you want to track?
- Pursuits, client touches/relationships, win rate

What features are essential to your users?
- Make your CRM easy and user friendly
- Implement one feature or module at a time

What metrics are important to your firm?
- Backlog, forecasting, hit rate, etc.
- What reports do you want to regularly run

2 Integrate CRM into Your Process/Strategy

Define your BD Process & Integrate your CRM into it
- Develop a flow chart of the process and accountabilities
- Regularly review and integrate with strategic planning

Review your organizational processes or develop new ones
- Opportunity / proposal creation and close-out process
- Project start-up and close-out process

Assign personnel/teams to each client responsible for the relationship & develop a Capture Plan maintained in the CRM

3 Plan for Success and Set SMART Goals

What information is valuable and worth keeping?
- Outlook contacts
- Current or previous database information
- Where is the information kept and how can it be accessed?

Prioritize!
- Data doesn't have to be entered immediately
- Which features make users efficient and make an impact

Identify BD, marketing, IT and/or accounting champions

4 Customize to Fit Your Firm

Customize fields and add buttons
- Make CRM work for your process and culture
- Turn off unused fields, sections, tabs

Make important fields required
- Identify "must have" and essential data

Keep CRM adoption in mind
- What will make it easy for users to learn and use?

5 Create Accountability

Build accountability into your CRM
- Review users adoption and usage during annual reviews
- Integrate compensation with CRM utilization for accountability

Accountable workflows and notifications
- Share data in real-time with everyone who needs it
- Gain company wide transparency and effective communication
- Stay on top of deadlines, goals and objectives
- Keep leadership informed quickly and efficiently

6 Track, Report, Analyze and Act

Track & Report
- Metrics and information that is important to you

Analyze the results
- Make any necessary changes to the process or system
- Distribute results to increase user adoption and buy-in

Act on them
- More targeted business decisions
- For a CRM to be useful, users must track **ACTION**

7 Train, Maintain and Celebrate

Train often and regularly
- Learning in never finished, there is always more to discover

Analyze the results
- Use maintenance reports for data integrity

Celebrate/Advertise CRM wins, no matter how big or small
- Have an ice cream party when a CRM goal is met
- Market your CRM internally with flyers, posters, success stories in the newsletter about how CRM helped win a project, etc.