

# CRM Maintenance

## Little pieces at a time

Here are some examples of reports to run to keep your data up to date:

- How to move a contact record to a new company
- How to create a new opportunity
- Importance of entering an owner for a contact record
- Explanation of how data is used and why it's important to accurately enter data

### Have CRM Champions

To have the most successful CRM you will need at least one champion in an influential role backing your efforts to move the initiatives forward.

- **Have them lead by example.** If they're using the system and sharing what great things they are able to accomplish with the CRM, their excitement will be contagious and encourage buy-in.
- **Be the voice of authority.** When they lead meetings, encourage them to only use the CRM and no longer use old systems or spreadsheets. If old systems and spreadsheets are not allowed, they will stop being used.
- **Be the voice of celebration.** When you hit a milestone include it in the newsletter or send a company-wide email. Ask them to author the article or send the email.
- **Be the voice of accountability.** If users are not entering information or keeping their data up to date or using rogue Excel spreadsheet ask your champion to remind them of the company's commitment to the CRM process.
- **Cut out the negative.** If you know or hear of users that are bad mouthing the system have the champion contact them and tell them to stop it.

### Identify your Users

It is important to know who will be using the system and how. To have the best user adoption and utilization rate, you need to customize the user experience. This can be accomplished by:

- Limiting what they have access to and allow only what is necessary for their role
- Ensuring they have the proper access (read-only, write, delete)
- Their first landing-page needs to be tailored to make their experience the most effective
  - » Least amount of typing, clicking and searching
  - » Having a recently viewed widget so the records they frequent are a simple click away
- Targeted training per user group
- Have an on-boarding process for new users based on their role

### CRM success is dependent on how well people use it.

Effective training leads to increased user adoption and contributes to success. So what do you need to have successful CRM training that translates into bankable results?

- **Consistency!** Having a standing monthly session over a brown-bag lunch or a standard time is important for continuity and for users to feel supported and confident.