THE 12 DAYS OF CRM

1 On-boarding new users can be tricky since new employees seldom come in groups. We suggest incorporating CRM training into the existing HR on-boarding process. Provide a pre-recorded CRM 101 webinar for employees to watch during the initial 90-days. Afterwards, follow-up with more advanced training, tailored to that specific user's needs.

2 When cleaning data in Excel, auto filters can help find missing/blank data fields and conditional formatting can help highlight duplicate values. Make sure essential or required fields are populated before importing your clean data. Remember to watch out for commas, as they can create extra or double spaces.

3 We recommend connecting your financial system to your CRM allowing data to flow in real-time. Click here to discover what accounting information is typically sent.

4 Make social media posting quick and easy by creating a calendar or schedule and assign each day a strategic theme or topic. Did you know CKearney Consulting provides Social Media Management? Click here to learn more!

5 Long-term success of CRM implementation and adoption is determined by your documentation. Be sure you have thorough notes on the decisions you make, how systems integrate, etc.. Nothing is more frustrating for users than filling in data only to have it overwritten the next day by another system.

6 The mobile app is great for technical staff in the field or BD on the go. Most CRM apps allow customized entry forms when using mobile, which reduces required fields increasing user adoption. Click here to learn how 65% of sales reps who adopted mobile CRM have seen a considerable increase in sales!

7 Schedule time to run CRM maintenance reports weekly or bi-weekly and fill in any missing contact or project details. Spending 30 minutes a week on this will save you hours later. Not sure what reports to run? Click here!

8 Create a CRM process chart to identify how your firm uses your system and how it aligns and interacts with your business. This will identify accountabilities and help ensure consistency. It's also a valuable training tool.

9 Use your CRM's "Activity Log" to document your communication history. Use the "Open Activity" area to create a new task or event indicating when and how you should follow-up. On your prospect follow-up day, log into your CRM and use the task log on your dashboard to remind yourself who you need to follow-up with that so no one gets left untouched.

10 When entering contacts, be sure to fill out all necessary data fields, even if the data may not pertain to your role, it could certainly impact other department reports. It is vital that you annually evaluate your existing fields. Go through your database and determine which fields are bringing value to the firm.

11 Ever been to an event and run into a former client but you can't remember what projects you've done with them or if there are any open opportunities with them? This is a great time to whip out mobile CRM and look at all the client's information.

12 Get creative with incentives! Quarterly CRM Happy Hours for "super users", data entry races for users entering proposal data after deadlines or competitions for business development staff.