Is Your CRM System Destined To Fail?

It's time to put your trusty CRM software to work; to let it earn its keep. You're about to blast an email out to several thousand potential customers. First you run a search of people and companies you want to target. You soon realize something's wrong when your list is far smaller than anticipated. A quick check reveals many profiles have not been filled in or are missing email addresses. Further inspection shows numerous records are incorrect; others are riddled with typos. And that's just for starters. With a sinking feeling, you realize this email blast isn't going to happen anytime soon.

Time for some damage control or preventative maintenance

Fortunately one of the most common reasons cited for the high failure rate of CRM systems - poor data quality - is also one of the easiest to avoid. Your CRM software is only as good as the information it contains. As the old programmers motto goes 'garbage in, garbage out'. So how can you avoid incomplete, incorrect, irrelevant or out-of-date and generally unfit-for-use data from permeating your CRM software?

You need to gather your key CRM users together and write a standard guideline document, defining the CRM system rules of use.

10 questions that should be addressed:

1. Identify who has what rights to the system; who can Create, Insert, Modify or Delete records? Forward this information to your system administrator to record.
2. Decide on a procedure to check for any duplicates before creating a record. Depending on what 'de-duping' or 'data scrubbing' features your system has, this might require some simple searches before starting a new record.
3. Do you allow abbreviations or acronyms? For example: IBM, or I.B.M, or International Business Machines Inc. A policy on ensuring consistency of input will help to avoid duplications in future.
4. Are records going to be created in Upper and Lower case and when are CAPS acceptable?
5. By when do you expect records, notes and so on to be created or updated? Same day, on return to the office?
6. Is the primary address of clients to be created as a postal or a physical address?
7. Make sure everyone checks spellings if they are unsure. When in doubt, ask the client or Google it.
8. Make rules for creating new tabs or Custom Objects (as salesforce.com CRM calls them.) Every time a new Custom Object is needed, it should first be approved.
9. Ensure that email addresses are put in correctly. Basic but common mistake!
10. Set up procedures, if not supported by your crm software, of how to create records from inbound emails.

Once your document is finished, get everyone to sign off on it. As standard practice, ensure that document is handed to all new employees at your company.

How do I reinforce this as time goes on?
Try this: select a couple of records - both good and bad - every week, to put on the overhead at staff meetings. Make sure you don't unduly embarrass anybody but watch this become the light-relief highlight of your meetings! People learn best when having fun!

What if your database is in one unholy mess?
Has the rot set in so deeply that your database needs a complete overhaul?
Turn this seemingly insurmountable task into an opportunity to you. This is an excellent excuse to re-establish contact with your clients and let them know you care.

Importantly, help your staff understand what you need from the data to facilitate more accurate marketing and reporting and hence the success of your business and their careers.

By creating a sense of pride and ownership in the company database, you are nurturing the essential process of buy-in, necessary for the success of your CRM initiative. Don't compromise this critical tool by allowing your CRM software to be infected by inferior data.

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