THE
5
PRINCIPLES
FOR
CRM SUCCESS

CRM doesn't have to be risky, if you do your homework. As our customer stories show, the pieces of the CRM success puzzle fall into place when a clear CRM strategy is defined: one that fits your company's customer-centric vision. Adopting a strategic mindset from the beginning ensures the selection of a CRM solution that meets both near- and long-term needs. And as each of our customer stories reflects, a flexible, adaptive CRM architecture, deployed with the following five principles in mind, is the foundation for your CRM success.

PRINCIPLE 1

CRM IS NOT A SOFTWARE PURCHASE. IT'S A STRATEGY

To ensure a CRM solution meets stakeholder expectations, define how CRM plays a key supporting role in the corporate strategy, articulate the ultimate state of the customer relationship, and consider its effect on all business units and end-users from the start.

Key questions to consider:

- How will CRM support your corporate strategy
- Which departments or functional groups need to be involved in system design and who will use it? Which processes will be impacted or require change?
- Do you have a strategy and communications plan that includes employees and partners in the CRM selection and rollout process?
- What are the training requirements to drive user adoption?

PRINCIPLE 2

CRM MUST FIT THE WAY YOU WORK—TODAY AND TOMORROW

Choose a CRM solution that includes a flexible architecture. This allows organizations to more cost-effectively tailor the system to their unique business process and to be adaptable and competitive as needs change. Growth and competitive changes can place a strain on some companies as they struggle to accommodate these changes within an inflexible technology structure. Forward-thinking enterprises select flexible CRM systems that will enhance their business agility.

Key questions to consider:

- Are your market conditions stable or dynamic?
- Will you need to change the way you do business to keep pace with or outpace the competition?
- What is your plan to keep up with regulatory pressures in your industry?
- What technology infrastructure is needed to support new systems, new data sources, and new users?
- Can all important and relevant customer information be collected and combined within this technology infrastructure?
- How will you accommodate change and growth within the system?

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PRINCIPLE 3
DEFINE MEASURABLE CRM BUSINESS BENEFITS

Consider the anticipated ROI of a CRM project during the selection process. By defining CRM success and identifying corresponding metrics up front, companies can help ensure their ability to demonstrate ROI when they need to. Management, business users, IT staff, and the CRM vendor must work together to pre-set the right targets and to tie the CRM technology to appropriate business processes and data requirements. This approach will validate a CRM investment in terms of business value executives and stakeholders can appreciate.

Key questions to consider:
- Have you established key business metrics? How will you report on them?
- Have you benchmarked current conditions and metrics for future comparison?
- If you choose not to adopt CRM, what might the long-term cost be to your business?

PRINCIPLE 4
CONSIDER TOTAL COST OF OWNERSHIP (TCO) CAREFULLY

Total cost of ownership for a CRM system can be hard to predict, due to the uniqueness of each implementation and the differing levels of complexity among enterprise technology environments. However, analysts estimate that up to 90 percent of total CRM costs are associated with customizing, integrating, deploying, supporting, and maintaining a CRM system. Companies selecting on-premise CRM face the majority of their CRM costs up-front. Although sometimes daunting, this allows companies to budget for and address most of their CRM costs at the outset, measuring ROI against initial investment and declining costs over subsequent years. In contrast, a cloud CRM delivery model typically requires a smaller up-front investment and attractive monthly cost, but over a three-year period, may actually have a higher total cost of ownership than an on-premise solution.

Key questions to consider:
- Are you considering costs over a three-year period?
- Have you planned for change or growth? Could you outgrow a "quick fix" and wind up spending more money a few years down the road?
- Have you considered the costs of data security and the cost of potential security breaches?
- Does industry-specific CRM make sense for your company?

PRINCIPLE 5
THINK BEYOND FEATURES: PICK THE RIGHT PARTNER

It's important to assess business objectives, technology strategy, IT budgets, opportunity costs, customization requirements before selecting a CRM solution. But beyond that, it's important to ensure that you're picking a solid partner you can work with now and in the future.

Key questions to consider:
- Does the service supplier have experience in my industry?
- Does the service supplier have strong, current references from reputable customer companies?
- Has the service supplier worked with companies our size?
- What kinds of implementation support can the service supplier provide? Does the service supplier follow a defined implementation methodology?
- What kinds of training options are available, and how flexible are they?
- What kind of technical support options and resources are available post-implementation?
- What if we don't have the skills in-house to support or manage the system?