



Ten Common CRM Mistakes - And How to Avoid Them

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Experts reveal some of the most common mistakes when choosing, deploying and using a CRM system — and what businesses can do to avoid or fix them.

Whether you're in the process of choosing a new customer relationship management ([CRM](#)) system, about to deploy one, or looking to get the most out of your existing CRM software, these expert tips can help you avoid some common CRM mistakes.

Here, then, are 10 common CRM mistakes — and how to avoid (or fix) them.

Focusing on features instead of process

"Buying a CRM system because of the features it has today is the stupidest decision you can make," said Martin Schneider, senior director of communications at SugarCRM. "Just like buying a computer — the system could be obsolete before you go live with the project if it is too rigid and relies on features instead of a fluid data model and simple process engine." And Schneider is not the only CRM expert to warn against "feature-itis."

"By themselves, all the CRM features in the world won't make sales reps collaborate, improve customer service or raise customer loyalty," said David Taber, CEO of SalesLogistix, a certified Salesforce.com consulting company. "Those results happen only when happy users have put good data into the CRM system as a natural part of doing their job. So the only features you should focus on are the ones that accelerate adoption by employees."

Deploying a CRM system that isn't optimized for mobility

Considering that today's sales force is mobile, your CRM system should also be mobile. Yet according to the experts, there are still companies out there using CRM systems that don't easily synch with mobile devices. The solution: "Ensure that your CRM system's mobile capabilities are tethered to the core CRM platform — and not another system that needs to be bought, configured, implemented and maintained alongside the core CRM system," said Schneider.

Trying to do too much, too soon

Start small — and gradually evolve your CRM system, say the experts. "The most effective CRM systems are built out gradually so that they fit naturally into the way you do business," said Taber. "Sure it's tempting to have a big budget and a fixed deadline — to get the project all over and done with — but that approach

almost guarantees a CRM system that doesn't work smoothly with your existing internal policies, channel interactions or business processes."

Similarly, don't worry about importing all your contacts in one fell swoop as soon as your new CRM system is up and running, especially if they are located in multiple places, said Pamela O'Hara, the president of BatchBlue Software. Rather, use an "incremental approach to CRM implementation and expansion," said Taber. "With the modern, cloud-based tools of today, companies can start small, taking on very little risk and proving the value of the CRM system to each team before getting more strategic," added SugarCRM's Schneider.

Not owning your information

When deploying a CRM system, you need to take the appropriate steps to protect your information from the start by setting up your system wisely, advised O'Hara. "Use the business name, business credit card, and be sure that a business email address is used when registering the administrator on the account," she said. "These steps will protect you from legal ambiguity about who can access the data, ambiguity you'll be thrilled to avoid if the employment status of the person who sets up the account changes."

Deploying from the top down instead of from the ground up

"In a world where social media and Web 2.0 application experiences rule, the key to successful CRM adoption is relinquishing control of the decision-making process to the end user, not to the CIO or vice president of sales," argued Schneider. Find out which CRM-related tools your employees like using "and create a formal program based on real usage," he advised.

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