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CRM Tips: Delete the Delete Privilege

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CRM systems are designed to be user friendly, not imposing undue security in the interest of usability and fast adoption. CRM users are business people who aren't likely to put up with sound arguments about the need for data hygiene. After a few months of disappearing data and incomplete reports, they re more likely to listen...but not at the beginning.

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So for most CRM vendors, the default settings for access control, feature availability, and field-level C/R/U/D privileges are "wide open." It doesn't take the Sales and Marketing types too long to figure out why they need to limit visibility of the opportunity pipeline or the lead queues, and they'll soon be asking to tighten up that level of data visibility. But they typically want far more privileges than is really good for system health.

As I wrote previously, a classic symptom of this is an excessive number of people with System Administrator privileges. Just say no. Instead, use delegated administration, field sharing controls, sales teams, or other advanced CRM features to give power users the access they need.

In this article, I'm going to dig into some more subtle access control issues, particularly around creating and deleting records.

Creating and Deleting Opportunities

The opportunity pipeline is almost the exclusive domain of the sales organization. So it stands to reason that they should be able to create opportunities at will. (Although, I'll argue that in a complex sales organization, the individual rep shouldn't be doing even that — see chapter 9 of my book for more on this).

Once an opportunity has been created, though, it really should never be deleted. The rep will want to, for emotional reasons. But that's the wrong thing to do: whether the opportunity is dead, has gone into no-action purgatory, or was completely unqualified (read: make-believe) in the first place, you'll never be able to improve your sales process if you delete these opportunities. Deleting opportunities not only masks the truth, it makes it un-knowable.

The right thing here to do here:

• Remove the delete button from opportunities for all users except the system administrator.
• Create new opportunity stage values for outcomes like unqualified deal, no action, budget withdrawn, politics, and bad data. (The wording here is important, so that reps and management don't interpret these as "sales rep failure.")
• Add a reason-for-dead (not "reason for loss" which will scare the reps off) in association with dead or lost deals.
• As soon as an opportunity is marked with these values, make it automatically disappear from reports, views, and searches, so that reps won't be reminded about the negatives. This is done using CRM workflows, access control, and page layout features.
• Create management reports for the VPs of sales and marketing that help them understand the failure patterns, so the business processes in both groups can be improved.

Creating and Deleting Accounts

The sales team typically believes that Accounts are their exclusive domain as well. But in an organization of any size, this just isn't true. If you're serious, CRM is connected to the accounting system, and creating an account can trigger all kinds of processes in accounting, finance and legal. So the reps should be allowed to create prospective accounts (that are not transferred outside of the CRM), but only sales operations, accounting, or finance personnel should be able to create full-fledged accounts.

Deleting accounts is even more of an issue. The basic rule again is "no," except by a system administrator or other data professional who understands the ramifications. This can be a big issue if you have duplicate accounts in your CRM/accounting system caused by linkages to your partners or channel. In some situations, you can't delete duplicates — all you can do is rename them and create a parent-child relationship with the main account in your Accounting system's database. Make sure the people running your deduping and data cleansing tools are properly trained on these issues!

Creating and Deleting Leads (or Contacts)

The marketing team is typically charged with Lead generation, and their campaigns may create leads by the hundreds on a daily basis. At least they hope so. And there's really no harm in creating lots of leads: with the right deduping tools and processing protocols, the history of customer interactions will be properly preserved even if a lead has been deduped dozens of times.

The marketing team, for obvious reasons, has no interest in deleting leads. But the Sales team often does. They want to get the worthless ones out of the way...and if there is a political war going on, they often like the opportunity to make marketing look bad. You want to look out for this: if you find a lot of leads being deleted, or if you find the "lead source" being changed, this should raise red flags about room for improvement in cross-organizational processes.

The hard reality is that 95% or more of leads may be no good: it does not help to hide this. You need to optimize your sales and marketing investment to fit with the yield and conversion patterns of your target market. So, like opportunities, leads should never be deleted: only hidden. The steps here:

• Remove the Delete button from Leads for all users except the system administrator.
• Create new lead status values to reflect: no interest, wrong level, bad match, no response, lost interest, and other specifics of disqualification. Also have a status for mailing list (these leads may come back to life) and bad data (these won't).
• As soon as a lead is marked with any of these values, make it automatically disappear from reports, views, and searches, so that reps won't be reminded about the negatives. This is done using CRM workflows, page layouts, access control features.
• Create management reports for the VPs of sales and marketing to help them understand the lead failure patterns, the cost of a bad lead, the proper qualification criteria, and the effectiveness of lead nurturing so the business processes in both Sales and Marketing can be improved.

CRM systems need to be used as the basis for optimizing business processes and improving the yield of sales and marketing efforts. If all you do with CRM is brute-force automation, you're just executing a bad idea faster. The first step to health is removing the users' ability to arbitrarily delete the records that can be used to analyze and optimize your business.

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