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Before Installing CRM Systems, Consult Your Org Chart

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When installing an ERP, accounting or even HR system, there's no question whom the users will be. It doesn't take long to identify the access privileges each class of user will need, either.

CRM systems, though, tend to be more multi-disciplinary, with information tendrils swimming across the organization. Serious CRM systems may interact with Web, marketing, ecommerce, telephony, email, IM, accounting, expense management, contract management, distribution, field service and even compensation systems. This makes for a serious integration challenge and begs the following question: "Who should have access to the CRM, and what should they be able to see and do there?"

Who Gets CRM Privileges?

It goes without saying that everyone in the sales and sales support section of your org chart should be users of the system, with privileges and access control based on their role and level in the organization. In most companies, the same is true of customer support, both pre- and post-sales. At least half of the marketing staff in most companies should be on the system as well; advertising, Web/social marketing, loyalty marketing, lead generation, field marketing, vertical marketing and partner marketing people need to be in the system frequently to do their jobs right. For other parts of marketing, such as public/analyst/investor relations, product planning, pricing, product management and product marketing, workers and managers will need at least access to CRM analytics to make good decisions and optimize outcomes.

Analysis: Before You Invest in CRM Software, Assess Your Needs

I'm going to argue that almost all the vice presidents in your organization need access to CRM data and analytics, too. As IBM's Thomas Watson famously said, "Everybody sells." Of course, CIOs and VPs of facilities aren't likely to be running a CRM dashboard—but their bonuses are at least partially dependent on company revenues and profits, so at the very least they should care about customer satisfaction.

When Do You Connect Users To the CRM System?

If CRM access is so important, then you want everyone on the system ASAP, right? Not so fast, Kemosabe. Ironically, the area of the system that has the widest interest—analytics and reports—is the part you need to go slowest in exposing. Why? The more elegant the analysis, the more purely distilled the data quality and semantics problems that are epidemic in CRM. (The perfectionists will howl, but the reality is that CRM data, due to its diverse origins, is almost guaranteed to be the dirtiest data in the enterprise.)

Whether you're doing a greenfield system or a CRM conversion project, the first users to make happy are the folks manning the phones: telesales and customer support. In doing their jobs, they are at their desks and on their computers all day long, so it's easy for them to leverage automation in a way that fits naturally with how they do things anyway. Since these folks type data for a living, their usage can fill the system with high quality data in a hurry.

Commentary: How CRM Data Updates Lead to Data Corruption

Plus, it's that data that's key for starting the virtuous cycle of more data driving more users who put in more data. Nobody wants to pay taxes, so adoption won't be genuine unless the users are getting something out of using the system.

The exact sequence of user adoption will depend on your organizations processes and preferences, but it's usually something like this:

- Telesales and customer support
- Their immediate managers
- Marketing
- Sales engineers, support engineers or field engineers
- Their immediate managers
- Sales representatives
- Sales operations
- Financial and contracts personnel
- Sales management
- VPs of sales, marketing and customer service
- CFO and VP of manufacturing/distribution
- The entire executive suite

This evolution of user adoption can take more than a year. It all depends on how quickly the data in the CRM becomes meaningful to the business decisions that each department makes.

What Can Users Do Inside the CRM System?

There's one more question: "What should these people be allowed to do in the CRM?" The general answer: "As little as possible to achieve their business goals."

A classic problem in CRM is giving users too many powers. Users will whine that they can't do their jobs with curtailed privileges, but your CRM system is guaranteed to fail if more than a handful of people have full system administrator privileges.

Working out the details of who can do precisely what under exactly what set of circumstances is a serious chore, but it is job No. 1 for any CRM deployment. In really big organizations, you may have 1,000 rules or more—and every one of them has to be right. One particular area where we love to stir up controversy is limiting the conditions under which an Opportunity can be created or any record can be deleted.

It surprises many companies to learn how many groups across the org chart need access to the CRM system. Ironically, it also surprises many companies how long it will take to get those users on board. To avoid blowing the budget and the schedule, adjust your expectations on both issues.

David Taber is the author of the new Prentice Hall book, "Salesforce.com Secrets of Success" and is the CEO of SalesLogistix, a certified Salesforce.com consultancy focused on business process improvement through use of CRM systems. SalesLogistix clients are in North America, Europe, Israel and India. Taber has more than 25 years of experience in high tech, including 10 years at the VP level or above.

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