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CRM and Sales: If it's Broke, Fix it.

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Fixing your CRM system and the sales and marketing organization will take some real time, and should be done in stages. Further, in both CRM and sales there's a serious talent shortage. Sure, there are people on the street — but just try to find a truly great salesperson or SFDC wizard in New York or San Francisco. So you should grab the employees and consultants whenever you can find them, and expect to fix the software and organizational issues in parallel.

Of course there are going to be interdependencies and policy issues that affect both the CRM system and its users. But a lot can be done to de-couple those dependencies and make it easier to rework and reconfigure asynchronously.

What Can be Done Immediately in the CRM System

No matter what the sales and marketing organization will eventually look like, there is a lot of foundational work that can be started on immediately. The first order of business is an assessment of the purely system issues, such as:

• how has the object model been modified
• where have custom fields and tables been put in, and what are they meant to achieve
• what custom functionality has been added (through custom code or plug-ins), and is it working as intended
• what are the data semantics (particularly for custom fields)
• how many dupes are in the system, and what's the data quality
• are the system integrations working properly
• what are the biggest usability issues

The list above can be the basis for a range of fix-it projects that can keep the CRM team busy for weeks.

What Can Be Done Immediately in Marketing

Even if there is going to be significant change in the marketing organization, there is critical background work that is almost always required for a highly effective marketing function. An objective assessment needs to be made about such things as:

• The number, priority, and quality of marketing campaigns. Typically, these need to be reorganized and renamed to fit the current marketing spend and lead generation targets.

• The e-mail marketing and lead nurturing system, and the content that drives it. As I've written before, marketing automation systems are content management systems in disguise — so if your content is out of date, off-target, or simply ugly, you need to bring it all up to snuff.

• Lead scoring and routing. As simple as these sound, they are too often done wrong and too slowly, leading to low conversion rates. Look to automate this entire process.

• Web forms and landing pages. You wouldn't believe how much difference the design of these pages can make, and there's no way to "tune" them unless you do split testing with your target audience. Start developing the infrastructure and processes for that testing now.

Fixing these issues can take many weeks indeed, and they'll be needed no matter what other changes may occur.

What Can Be Done in Sales

When upgrading a sales organization, there can be policy changes that blow away a lot of the status quo — particularly if there's a change in channel or vertical-market strategy. Even so, the sales folks can be helping build the future while waiting for the new boss:

• Helping the CRM team understand the semantics of custom fields, picklist values, and workflow states.

• Helping the CRM team understand (or, heaven forbid, document) business processes and policies at the start and end of the sales cycle, particularly those that involve channel partners.

• Helping the CRM team understand the usability issues, particularly items that slow reps down or degrade system credibility.

• Cleaning up Account and Opportunity data, particularly the stuff that only they know.

And What Has to Wait

There are certain issues that simply cannot be progressed in the CRM system until the sales and marketing organization has solidified its leadership. The list below may look simple, but each item has ramifications all across the CRM system:

• Security model and access: how much should reps see?
• Lead, account, and opportunity distribution: how is ownership of these key objects determined? What happens if a rep has let one of these assets go stale?
• Territory definition, particularly when there are territory overlays
• Use of the named account vs lead generation model
• Sales and support teams
• Rules of engagement for channel partners, inside sales, and outside sales
• Quotas and forecasting model; comp plan and incentive structure
• Price list SKUs, number of price lists, and discount schedules
• Standard terms and conditions, and related internal approval processes

As I've written endlessly, CRM systems aren't like the rest of enterprise software. To be effective, CRM systems must closely match the policies, processes, and people in the sales and marketing organizations. Even so, when there's change ahead for those teams, there's no excuse for delaying the start of CRM work. As always, an Agile methodology is the most effective way to cope with concurrent efforts and ongoing policy or organizational change.

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, and David has over 25 years experience in high tech, including 10 years at the VP level or above.

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