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CRM Deployment: Users Can't Set Timetable

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With most enterprise applications, the executive champions and the user community are typically measured and have manageable expectations. Think accounting. With CRM, it isn't necessarily so.

CRM Definition and Solutions

Despite the user community's urgent calls for this or that functionality, CRM is still enterprise software that needs to be done with an architecture and a plan. Deployments of unstable new functionality (or pushing existing functionality to unprepared users) can diminish the credibility of the CRM system. This can mean serious backsliding of user adoption, unwinding the virtuous cycle that is at the core of CRM success.

How to manage this issue? You won't be surprised that I advocate incremental deployments and Agile project methodologies, as they are the fastest (and cheapest) way to get functionality safely deployed. That said, iterative delivery is necessary but not sufficient. To establish sensible CRM priorities, you need to add the following principles:

Data First, Functionality Second

There's no point in building (or even switching on) new functionality if the underlying data is incomplete, dirty, or riddled with duplicates. While nobody can afford perfectionism, getting relevant system tables cleaned up is a precursor to progress. In nearly every table, the error rate needs to be below 5 percent, and even 1 percent for critical fields and pointers. Pretty much the only area where you can tolerate as much as a 20 percent error rate is in leads, as its speed of "information rot" makes higher standards uneconomical.

Accounts and Contacts are the Most Important "Static" Data

In most CRM data structures, the accounts table is the top of an information pyramid, with a dozen or more child tables pointing to it. If your customers are large multinational corporations, the account records themselves may be part of a hierarchy. So making sure that your account records are right (and agreeing with the data in other systems) is a key milestone. Fortunately, the account records themselves shouldn't change all that often.

Relating to the accounts are the contact and contact role records, which need to be accurate and free of duplicates to make sure that calls, e-mails, and action items are properly tracked. Unfortunately, in 80 percent of the CRM databases we see, the contact role record (it's just a pointer, really) is empty, rendering almost any marketing effectiveness or serious pipeline analysis impossible. As this field can only be filled in by humans (either sales or telesales), the only solutions are incentives or other behavior