

# To Thrive During COVID-19 Recovery, Shore Up Your CRM Foundation

*Three process pillars must be in place to steady your system*

**G**IVEN that CRM systems are no longer a small-budget item, companies suffering from CRM system user fatigue need to get proactive about driving their systems' success as the economy moves through COVID-19 recovery. Remember, your customers' needs have changed and will continue to change because of COVID-19; now more than ever, you need to engage with them in their new digital comfort zone.

For 35 years, I have had the pleasure of helping dozens of companies successfully implement robust CRM initiatives, as measured by high user adoption rates, holistic customer profiles, strong user engagement and satisfaction, and tight linkage to core sales, marketing, and customer service processes. Although CRM technology has evolved significantly over the years and has helped to secure CRM user adoption, three non-technology foundational pillars must be in place for your CRM program to thrive during the COVID-19 recovery.

## PILLAR NO. 1: ENSURE THE 3X FACTOR

For every one piece of information users are asked to put into the CRM system, they must get at least three valuable pieces of information back from the system; otherwise, they won't be motivated to use it. If the 3X factor is achieved, the CRM system will succeed.

Companies fail to realize the 3X factor for three reasons:

- **The CRM system was created by executives for executives.** Helping sales reps do their jobs better was an afterthought. The CRM system for one of our customers helps executives see the volume and value of business opportunities by rep and by region, nationally or globally. While this functionality provides great value for executives, the sales reps that input the data realize very little value from it unless, for example, the system begins to provide real-time updates for each entered opportunity, which is what sales reps wish to see.

- **The CRM system does not support the way sales reps do their jobs.** Often, a CRM system's sales pipeline stages do not align with how reps sell, or the pipeline process fails to connect reps to external information that will provide needed sales intelligence, such as organizational structure, competitive product purchases, etc.

- **The CRM system contains incomplete and/or inaccurate data.** Nothing turns off sales reps more than being unable to trust CRM data. The reps will stop using the

system and create a parallel system containing complete and accurate data.

## PILLAR NO. 2: FOCUS ON OPERATIONS FIRST

Want to win the hearts and minds of CRM users? Given that user buy-in accounts for 50 percent of a CRM implementation's success, secure early buy-in by delivering CRM functionality in bite-size iterations that address their immediate operational needs. For example, send them their monthly sales commission reports, get them clean and accurate customer data, provide external information (e.g., organizational changes) about customers/prospects, etc. As you resolve users' operational issues, then and only then should you focus on functionality that supports "executive" vision, e.g., executive dashboards displaying the approval status for each opportunity, a one-page national or global overview for each national or global account, annual customer strategy plans, etc. In other words, move (in steps) from an 80 percent focus on operations to an eventual 80 percent focus on executive vision; this is a bullet-proof way to win over your CRM users.

## PILLAR NO. 3: LEVERAGE THE CHANGE MANAGEMENT LADDER

The change management ladder has five basic steps: awareness, interest, acceptance, involvement, and commitment. These steps are hierarchical—as you roll out new CRM functionality, users must master each step in the change management ladder before moving to the next one. Company executives need to create and then execute an effective change management plan that includes clear communications, meaningful training, and attractive rewards for each CRM user. Great companies implementing successful CRM systems know there is no exception to this rule.

Now is the time for your company to conduct a CRM assessment to ensure you meet the 3X factor, focus on operations first, and leverage the change management ladder. My prediction: Successfully accomplishing these three foundational pillars will separate the winners and losers on customer engagement. 

*Barton Goldenberg (bgoldenberg@ismguide.com) is president of ISM (www.ismguide.com). Since 1985, ISM has established itself as one of the premier strategic advisers to organizations planning or implementing customer strategies to address digital transformation, data analytics, CRM, social media communities, customer engagement, and emerging technology initiatives. He is in high demand as a keynote speaker (www.bartongoldenberg.com) and is author of four books, including his latest, The Definitive Guide to Social CRM. He is currently completing a new book, Digital Customer Strategy: Your Roadmap During Covid-19 Recovery.*

