



# Getting ***CRM Right***

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Some experts\* say that nearly 50% of all CRM installations do not live up to the customers' expectations. That number may be high. However, no one would dispute that too many companies fail to implement a CRM system that would serve them best. Yours does not have to be one of them if you follow some simple guidelines.

In over 500 implementations, we have found the following process to be effective more than 85% of the time when deploying CRM systems ranging from 50 to 1200 seats:

### **Guidelines for Achieving a Successful CRM Implementation Process**

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1. Understand your business process clearly and completely - from the time you obtain a lead or a suspect through to closing the sale and beyond. Gain agreement from the stakeholders on the documented process.
2. Map your business process into a powerful, customizable CRM platform, using out-of-the box functionality as much as possible. (These particular installations relied on the Sage SalesLogix CRM solution, a leading choice worldwide for small to mid-sized implementations.)
3. Customize your software to handle essential, unique aspects of your business process. Re-engineer flawed aspects of the process for better operational performance and so that it can be integrated cleanly into your CRM platform.
4. Commit your sales team and management to use your CRM solution as a required component of the daily sales and marketing management process. Success depends on your organization's ability to obtain concurrence at all levels of management and staff on the goals, objectives and requirements of the solution.

It is interesting how often we find significant disparities in the expectations of different departments and levels within the organization. Because many implementers utilize a top-down design methodology, such disconnects are rarely discovered or taken into account. In contrast, Ambit Software uses training and other means, not only to ensure users' proficiency, but also to obtain concurrence on the process and a broad-based commitment to utilization of the system.

### **Multiplying The Benefits**

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Well designed and implemented CRM systems, which follow these guidelines, deliver quality service and build great relationships for companies by ensuring the right people, get the right information, at the right time. Embarrassing delays due to credit holds or incomplete approvals are avoided with back office system integration. A unified customer view means sales and support teams no longer give customers conflicting information. Sales personnel provide customers better solutions based on their improved familiarity with support functions. Support staffers bolster sales efforts by advocating for the sales team's current proposals. This is just the beginning. Special custom tools in the CRM system calibrate the sales process to address specific requirements of target buyers and other influencers within the buying hierarchy. This ensures that sales reps correctly execute each step of the sales process. Step-by-step procedures for using the system should be incorporated into a Sales Playbook and reinforced by training to foster their continued use. While out-of-the-box functionality reins in implementation costs, carefully selected customizations deliver big wins.

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**Here are a few examples:**

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**Expanding The CRM Structure:**

A large financial services company with an extremely broad pre and post-sale structure required an expansion of the basic Sage SalesLogix CRM product from a 3-tier (Account, Contact and Opportunity) structure to a 5-tier structure that included Customer and Legal Entity (Division). Ambit enhanced the Sage SalesLogix CRM structure to support multiple levels of data associations. The CRM system now accurately mirrors the company's highly successful, complex business process.

**Team Selling - Keeping Score:**

A sophisticated team selling operation spanning multiple divisions wanted to qualify its customers by assigning numeric values to the various account qualification questions. The values, which sum to 100 points, allow the company to relate qualification scores to the opportunity status. The company can now correlate qualification scores with historical data to determine the probability of closing at any given time. As a reality check, each sales team member independently assesses the opportunity qualification. The results are compared by the system, helping reps improve their ability to evaluate prospects. The system also lets team members know which relationship requirements are unfulfilled, making it easier to move the sales process forward with every contact.

**Separating Tangled Processes:**

A customer retained Ambit Software to investigate why their sales forecasting was consistently off the mark. Users forecasted sales based on data that was largely a reflection of the system's single sales process. Through the assessment process, Ambit discovered the company had interwoven multiple workflows and sales processes into a single model.

Ambit helped the customer separate the two processes and developed an effective scoring system for each. Ambit then developed an integration with an external proposal generation system that updates the opportunity product and proposal values whenever proposal data changes. The result is a clean, streamlined CRM system that enables the company to accurately score the sales process and forecast sales based entirely on relevant information.

**Choosing an Implementation Partner**

To narrow down your choice of candidate for CRM vendor and implementation partner, here are some critical points to evaluate:

- Years of experience.
- Number of successful systems implemented.
- Experience of technical staff.
- Ability to integrate with a broad range of platforms.
- Availability of partners (worldwide if necessary) to assist with installation, training and local support.

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I'd like to know what you think.

**About Ambit Software**

Ambit Software helps enterprises globally to become agile - adapt rapidly and cost effectively in response to changes in the business environment through the efficient use of IT. Ambit partners with its clients to understand their business pain points and arrives at appropriate IT led interventions to deliver a relevant solution. Ambit helps organizations across sectors such as Discrete and Process Manufacturing, Financial Services, Logistics, Consumer Goods, Hospitality etc. to achieve their business goals through effective use of technology.