



# Three Strategies Businesses Employ for a Problem-free CRM Implementation

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# Introduction

Today, businesses need to differentiate on more than price, by building a deep level of engagement with their customers. That is where a CRM will help.

But maybe you're worried your investment won't perform up to expectations. You may dread the consequences of poor user adoption—or bad quality data, gumming up your analytics and sales forecasts.

You're not the first person to encounter these issues. Thankfully, there are plenty of ways to pull off a problem-free implementation. As you go through the process of planning and preparation, keep in mind that CRM is more than just software—it's a synthesis of process, technology and people.

This guide walks you through how to get higher CRM adoption and an exceptional return on your technology investment.

**53%**

of companies invest “significantly”  
in CRM technology to boost  
sales productivity

— [Forbes & Brainshark report](#)

# 1

## Tech and process: Optimizing Information Management and your CRM Software

Optimizing the management of your customer data and your CRM software is a critical step. Consider the following:

- **Strive towards a single version of the truth:** You may have legacy records of customer interactions scattered across your organization. Start by consolidating these data-sets into your CRM so stakeholders can find everything they need in one centralized location. This enables fast, personalized service, with instant access to SLAs and other critical documents.
- **Audit your data:** Do an inventory of your data including spreadsheets, backend systems and notes kept by reps. Record the name of data sources and fields in which data is stored—and note any potential concerns over data quality. This includes the presence or absence of automatic quality checks, field mapping issues and any possible duplication of entries across and within data-sets. If you need assistance, Maximizer's Professional Service (PS) team offers data migration services at very affordable rates
- **Prioritize data cleansing:** Next you'll need to do a data clean up. It's best practice to start with the basics: addresses and emails, then move on to specific business information such as opportunities and sales stages. Then remove duplicative fields and entries. A Maximizer PS team member would be happy to help you with this process if needed.
- **Configure your CRM for clean data entry:** You've surely heard the expression "garbage in, garbage out". Cleaning dirty data by hand is a ton of work, so it pays off big to enlist users to clean data as they go. To make it easy, ensure your CRM is configured to automatically capture the right points at data entry. Maximizer lets you easily add and name additional data capture fields, specify mandatory fields, and embed proper documentation protocols into your workflows.

# 2

## The Human Side: Define your Adoption Targets and Messaging

- Next, consider the human side of the equation. Get started early, as you'll need to entrench a customer-centric culture and effective documentation procedures prior to implementation. If you haven't done so already, **appoint a CRM adoption team to spearhead your adoption plan**. This team includes departmental leaders who champion CRM use and resident CRM experts who can provide hands on assistance to users across your organization.

Your adoption team should focus on promoting these objectives:

- **Aim for CRM usage across Sales, Customer Service and Marketing:** A rule of thumb is that the more customer-facing staff using your CRM, the better. Pooling information in a single location, accessible by those interacting directly with customers, confers incredible downstream benefits. According to the [McKinsey Center for Business Technology](#), companies who create a single view of customers can increase revenues up to 15 percent. As an all-inclusive solution with Sales, Service, Marketing and Analytics functionality, Maximizer makes getting coverage for all team members very cost-effective.
- **Stress the importance of proper documentation:** One of the biggest stumbling blocks to adoption is the quality of information within the CRM. You may need to mandate that sales and service reps log detailed call records, flag important correspondence and update contact information regularly.
- **Enlist key personnel as CRM stewards:** Data-collection ultimately falls most heavily on your sales and marketing teams—and especially your sales representatives, whose enthusiastic participation is critical. Get these groups onboard as early as possible, by helping them understand how they will benefit from collective intelligence. They'll be the ones who determine the accuracy and comprehensiveness of your customer data.

- **Explain the “WHY” behind your CRM:** It’s not enough to educate staff on how to use the software. Your teams will need to understand how it saves them time, enables them to deliver better service and tracks their performance. Explain how proper documentation and sharing benefits everyone. For example:
  - Sales can quickly retrieve service and maintenance details for follow-up calls, impressing customers—and empowering reps to exceed their sales targets.
  - Field technicians will appreciate how a mobile-enabled CRM helps them to deliver fast, accurate service with instant access to critical forms and documents, including SLAs.
- **Lead by example:** This is classic advice—and for good reason: Your staff will look to you and the rest of the leadership team for guidance. Make sure your department heads are active CRM users, who leverage CRM-based reports showing them how their department is performing. If employees know that managers and leaders track individual and team activity and results in CRM, they are far more likely to keep customer data up-to-date. You can also incentivize salespeople by basing commissions on what is in the CRM.
- **Build an on-going, multi-level training curriculum, with regular check-ins:** At Maximizer, we provide free weekly webinars and live customer support for CRM Live users and those with active maintenance agreements, to shorten the learning curve and help you maximize the value you get from your CRM solution. But you’ll want to assess your own education needs with regular adoption team check-ins. Outline real-world use-case scenarios relevant to your business, and decide where supplementary training is needed. Your training curriculum must consistently align with changing team objectives to ensure continual adoption.

# 3

## When you're Ready to Buy...

A glitch-free implementation requires addressing CRM's human, managerial and technological sides. If you follow the above steps, however, you're more likely to see higher rates of user adoption and superior data quality, creating a continual cycle of improving use and deepening customer insight.

Choosing a CRM solution designed specifically for your industry also helps. Maximizer CRM for Manufacturing takes care of the software behind your CRM strategy—arming you with superior functionality and data. Its preconfigured workflows match the complexity of managing your network of customers, distribution partners, suppliers, and more—while the customer service module helps you track and manage support tickets, freeing service teams to deliver exceptional, timely service on the go.

To learn more about how Maximizer sets you on a glide path to successful implementation, [contact](#) one of our advisors for a free 30 minute demonstration.

## About Maximizer

### Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.



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