

# 9 PROVEN WAYS TO F\*%\* UP YOUR CRM PROJECT



**RPM Group International**  
Revenue Performance Management

Successful CRM projects have active and enthusiastic sponsors. Unsuccessful CRM projects don't. Senior management has to be visibly and vocally committed to CRM success—and the waning or absence of such commitment is clearly correlated with CRM failures.

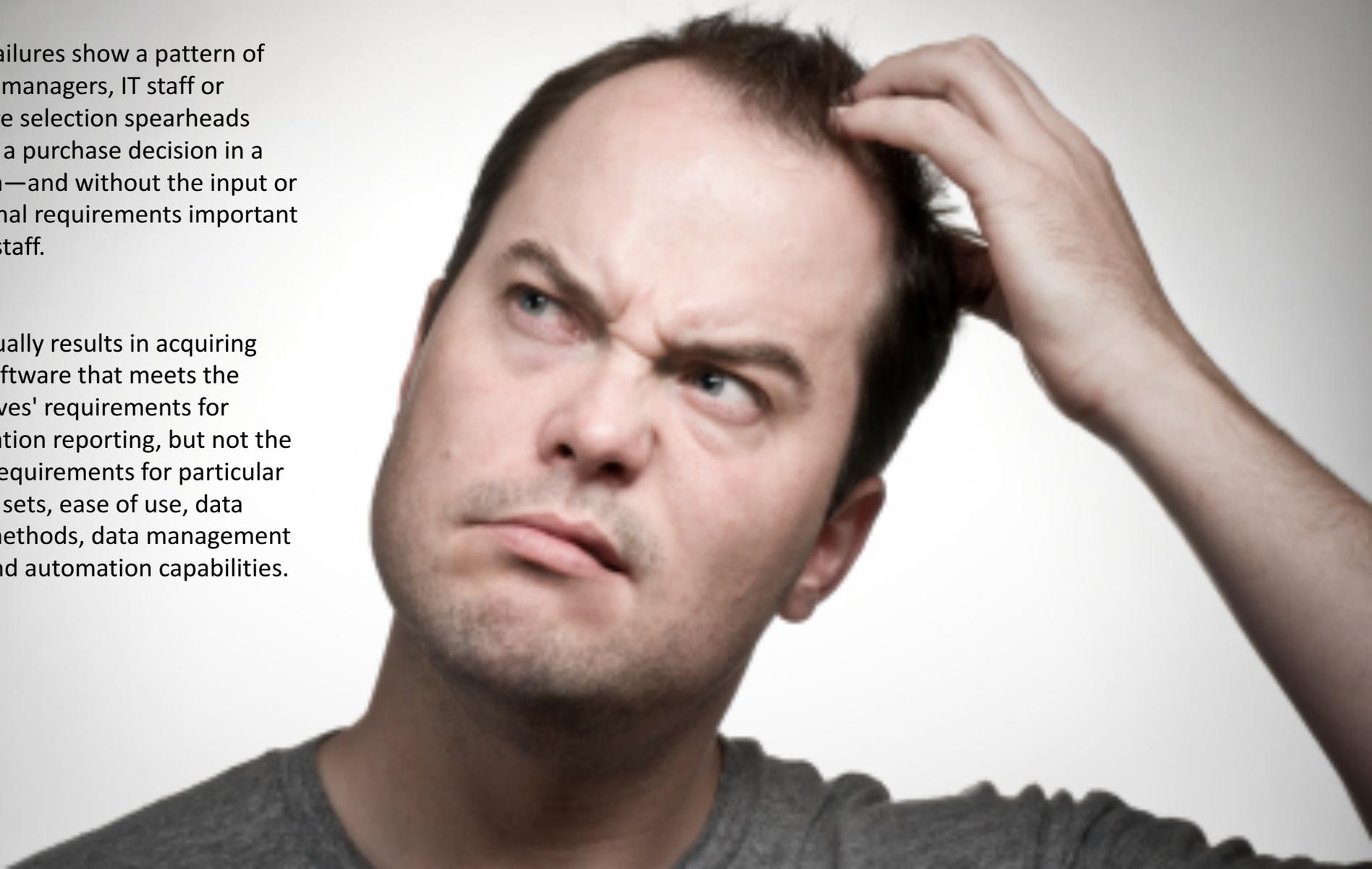
# Weak Leadership

Without the right sponsorship, all but the most limited CRM implementations are correlated to failure.

## 2. DON'T INVOLVE USERS IN THE SELECTION PROCESS

Many failures show a pattern of project managers, IT staff or software selection spearheads making a purchase decision in a vacuum—and without the input or functional requirements important to line staff.

This usually results in acquiring CRM software that meets the executives' requirements for information reporting, but not the users' requirements for particular feature sets, ease of use, data entry methods, data management tools and automation capabilities.



### 3. DON'T RUN AN OBJECTIVE SELECTION PROCESS / PROJECT

This more often than not results in choosing a product that is poorly aligned to the business needs. In fact, this is often the result of getting enamored with gadgets, bells and whistles during the software selection process—which is a recipe for a challenged implementation and failed ROI. Some CRM vendors are excellent at the hype and only too proud to boast of their latest marketing award or advertising run.

Others emphasize the hype of their newest software features in a guided effort to change your buying criteria to align with their latest product announcements. This dynamic adds even more confusion and complexity to the already arduous task of selecting the optimal CRM software which best aligns to your most strategic objectives and resolves your biggest pain points. Even worse, force fitting new, never before considered software features into an implementation effort may unnecessarily add cost and risk.



## 4. MAKE IT A TECHNOLOGY PROJECT

When CRM becomes an IT project, the project is destined to be “challenged”. One of the most common causes of CRM failure is to approach CRM strategy as a software or technology project. Too many failed implementations begin with the IT department installing the system, getting it running and then wondering why the strategic or even the basic business benefits fail to be realised.

Even when the technology installation and integration is flawless, the implementation will fail if the software fails to deliver for its internal customers or the company culture fails to orient itself to the customer's viewpoint.



## 5. DON'T SET CLEAR GOALS

A failure to failure to define a clear set of measurable business or economic objectives. This also includes trying to go through an implementation without measures and milestones.



## 6. USE DIRTY DATA

Data quality must be in place for information to be believed, trusted and acted upon. This is why data integrity and data quality measures are critical to CRM software implementations. Many challenged CRM implementations incurred an early project delay because of a failure to survey the data prior to the conversion.

This was then followed by the untimely discovery of dirty, duplicate, incomplete and bogus data. This then results in added activities to the project plan for data cleansing routines and puts the project behind relatively early in the project.





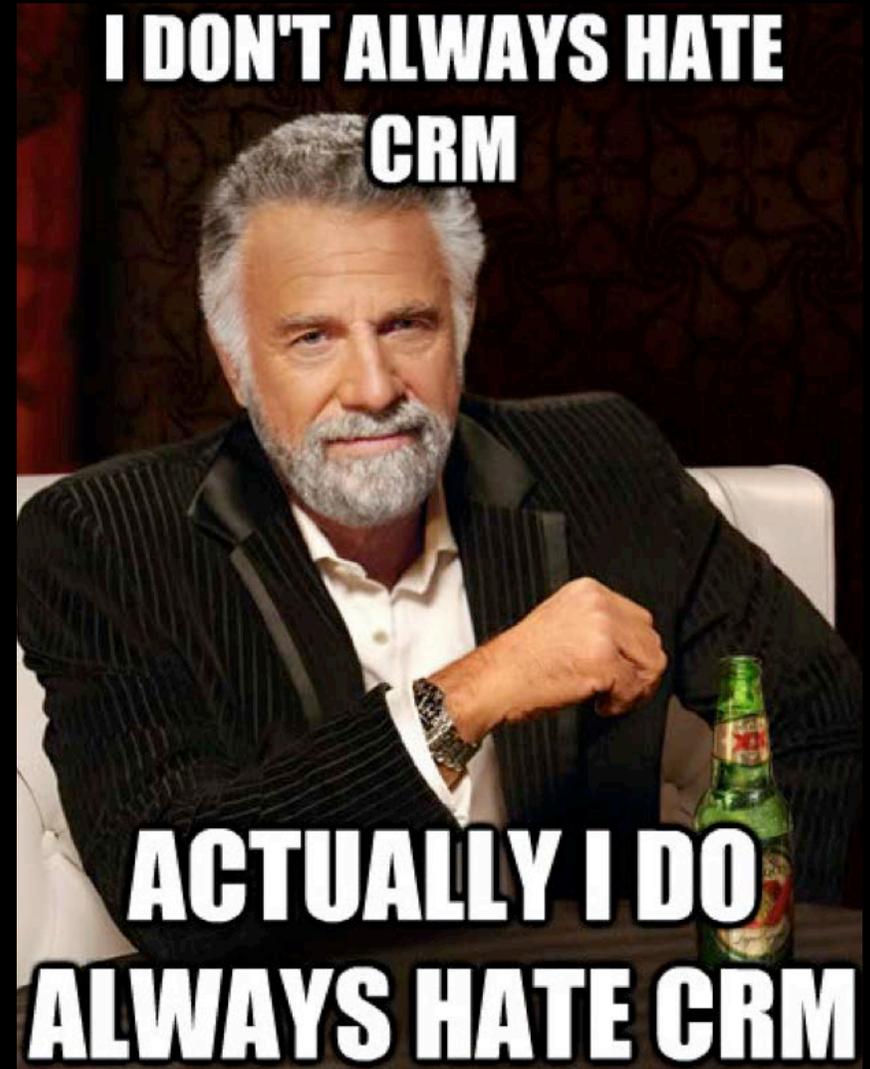
## 7. TOO MUCH CUSTOMISATION

This is often a reaction to choosing the wrong CRM software system. No packaged software will meet all of your functional requirements. More so, it's often the feature sets that support the companies competitive advantages that are more difficult for packaged software. Therefore, software customisation is often warranted. But when customisation goes beyond the core constructs of the application it inherits great risk of time and budget overrun. And even if and when it is finished it becomes difficult to manage, hard to upgrade and expensive to support.

## 8. UNDER-ESTIMATE USER ADOPTION CHALLENGES

Ah, the dreaded change management. User adoption fails when users apply a grudging acceptance of what management believes is inevitable change. Even though you might believe you are achieving your goal at first glance—simply because users are using the CRM system—if they aren't doing it enthusiastically, you will likely end up failing, albeit more slowly than if they had rejected it from the beginning.

Employees who are just going through the motions without the motivation and intent to achieve cited business benefits are simply passing time and delaying the CRM benefits. Force normally doesn't work for the long term and trying to make it work is often like death by a thousand small cuts.



## 9. DO A “BIG BANG” IMPLEMENTATION



Deploying every CRM module at the same time often injects more business process and culture change than most organizations can accommodate. This big bang or watershed practice invariably ends in cross-functional chaos that delays or destroys ROI.



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