Back to Basic - Implementing CRM and/or Digital Marketing Automation.

Businesses deciding to go for a CRM solution or indeed jumping on the Digital Marketing steam train, needs to pause and ask themselves; WHY? and not least HOW?. When starting the process of choosing a new solution for the business, it often seems to be heading straight for complex detailed discussions about system functionalities, so much that the overall and rather basic requirements are forgotten. This will typically come back and bite everybody involved at a later stage. This can seem obvious to a lot of people but in general, implementation of automation gets too complicated and it doesn't need to be.

For instance, if an organization decides to implement a CRM solution, the first thing they need to ask is WHY? - Why do we want to do this? What exactly is it we are trying to achieve, what are the objectives and not least, what are the expectations for the end result. Is it actually a CRM solution that is right for us as an organization? or would we benefit much more from "just" a really well functional sales- and marketing database with decent stats facilities? Is it a question of giving the sales teams a tool they so desperately need and the management a tool to measure performances? Do we NEED a full blown CRM solution that is designed to deal with almost all aspects of a generic business setup including making the coffee?

Often the answer to this NO…. We don't really need a solution that will run a full blown Call Center and tech support department, manage Contracts and running a Partner Portal – not initially anyway! I'm not saying that businesses shouldn't choose a CRM type solution which can be expanded into the areas that might be worth developing at a later stage, BUT think about what you actually NEED in step one and not all the "nice to have's". If you are running a smaller organization, and after a close look at the actual needs and expectations it turns out that what the business really need is a tool to run Sales and Marketing then STICK to that and leave the rest for a later stage. It is extremely easy to get carried away as you discover features and possibilities and you loose perspective. If and when that happens, Bring it Back to Basics… what do you actually need!

One other extremely important point is to make sure that you have the structure and processes in place to deal with all the new data that you are creating and will be floating to your teams. I will address this in a later article but it is important to bear in mind.

The same goes for Digital Marketing automation … Digitalization and Automation is fantastic for developing any business potential, but it is also a heck of a mouthful for any size organization to implement, and I suggest starting with the basic functionalities. Don't let yourself get carried away with all the weird and wonderful tools and solutions waved at you every day. It seems that all organizations with an ounce of self-respect are jumping on digitalization which is great but again…. WHY? and more importantly, HOW do they deal with the demand that they create? Questions such as "Is our organization geared for Social Media presence" or "Have we got the sales processes and structure in place to deal with the interest generated by digital marketing programs?"

Don't embrace all aspects of Digital Marketing Automation (Demand Generation) without selectively choosing which automation functionalities will work for your business. It takes a lot of manpower and a lot of skills to do it right so be sure to get the basics in place first and then expand as your teams are developed accordingly.

As a CRM and Digital Marketing consultant I see a lot of companies trying to run before they are ready to crawl and that is why so many CRM and Automation projects fall flat on their faces.

The art is to move forward with the right speed and the right expansion and to never forget the people who are actually working with the tool on a daily basis and making sure that their needs are met as priority number 1. Always involve everybody affected by the implementation of any new tool and not least, involve the people who you relay on supporting the processes in the future.

Make sure that you work with people who are professionals in the field of Digitalization and implementation of solutions, internal analysis and processes.

It is Never too late!

If you "own" one of the many businesses that have implemented a solution and maybe tried to move too fast with too much, or if you only use a very small part of what should have been a highly functional and sophisticated tool, don't despair – it is never too late to give it another go with a revised approach and probably a revised budget. Business processes changes almost daily to ensure lean and efficient productivity, and the system implemented needs to follow this fluidity to cope with every day hands-on tasks. If a solution once implemented is ignored, it will crumble and die. Teams depending on moving things through an organization will find other ways to reach their goals if the process support tools are broken. So remember, that anything implemented needs to be continuously supported either by an internal team or outsourced manpower.

It is always a good idea to go back to the drawing board if implementation, customization and user adoption seem to be slipping…. Bring it back to basic and start again or adjust expectations and objectives.

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