

Your CRM IMPLEMENTATION

The Top CRM Implementation Mistakes



How a CRM solution is implemented determines the success your company can gain from it. We've identified common implementation mistakes so you know what to avoid and plan for. We hope that you find this information valuable. If you have any further questions, give us a call!

● Poor Communication

Communication is key. Prior to Implementation, be sure to establish an open dialogue to ensure that you have a full understanding of the implementation effort and that there is a comfort level with the scope of services being proposed. Make sure there is a clear understanding of your business requirements and existing processes.

● Lack of Internal Support

Early buy-in from key stakeholders and upper management across all departments is important. Demonstrating good buy-in from the top shows the commitment and dedication needed for end user adoption. Include all departments from the start of the project in order to align the goals and strategies each have when it comes to customer interaction. Involve both Business and IT in the implementation process. One without the other is always fraught with peril.

● Dirty Data

A CRM solution is only as good as the data living in it. Prior to Implementation, ensure your data has been cleaned - standardizing entries, removing duplicates, establishing fields. Make sure Sales understands the importance of good data and how the quality impacts marketing, customer service and all other departments. Establish data entry processes early on so the data stays clean and consistent.

● The Wrong Approach To Training

Lack of training that is specific to the end user will drastically affect user adoption. Skip the company wide mass training and design smaller department based sessions that are geared toward specific roles and goals. Proper training ensures metrics and processes specific to each department will be established, maintained, and followed.

● Growing Pains

Making CRM decisions based on the current state of your business and neglecting to consider the future will cause you a lot of pain. The solution may be adequate few years but growth happens. Assess your data and business goal to ensure that your CRM Solution can scale as your business does.



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