

Successful CRM Defined

By Jeff Reade

“One piece of advice I would give people who want to have a successful CRM implementation is first to define success,” says Lydia Bednerik of Wendel, Rosen, Black & Dean in Oakland, California. “If you have defined what you want out of a CRM system in advance, it’s easier to know if you got it, and also to measure results and celebrate successes along the way.”

According to Bednerik, there are several ways to measure success: marketing’s priorities and end user priorities are two basic examples - different definitions based on different audiences.

“I would say we are 85% successful right now from a marketing perspective - everyone’s data is in the system and being updated, we can create mailing lists, track projects, etc. We are not using all functionality yet, so there is room to grow. 100% success will be when we have additional data on the contacts and companies in the system, both from internal (client & matter, practice area, etc.) and external (industry codes, etc.) sources and can even more readily create and track lists.”

From an end-user perspective (which she defines as the attorneys and staff who access the data from Outlook) Bednerik considers the fact that most people in the firm are continuing to function in Outlook is a success, with little knowledge that the back end system is completely different. “We are constantly adding more and more data on more and more contacts. Over time, those that haven’t noticed may begin to realize there’s additional information in their contact records and begin to value it -- who knows whom, which mailing lists they’re on, what industry they’re in, etc.”

Although by those two measures they have experienced success, it didn’t necessarily come easily. “We learned a few lessons along the way,” says Bednerik. Some of those were:

Plan the data. “We made a mistake and just dumped our existing data into the system, thinking it would be easier for end users if we just captured it all in the beginning. In one case, one lawyer had the entire firm address book from 5 years prior in Outlook. Combining it with the current data was a nightmare because we ended up with thousands of duplicates, but couldn’t tell which information was correct.” The lesson: It’s important to look at every individual user’s

Outlook data to verify that it is acceptable to bring into the system. Do whatever cleanup you can before mixing it with good data in the new system.

Phase in the data. Trying to get the data perfect immediately - 100% clean and complete - is too time-consuming. The first layer of data is basic information (names, addresses, phone numbers, email). Filling in other data or thoroughly cleaning addresses should come later. Making sure to eliminate duplicates is more important than whether the address contains “St.” or “Street”.

Standardizing data entry and training the users as to how to enter the data is important as well. The “File As” field in Outlook can confuse users, and they end up putting in “Clorox Company, The” to make Outlook lookup easier. However, you don’t want the information to output onto a label that way. It’s important for everyone to understand that because their data is going to be shared with everyone, they need to enter it consistently.

Phased rollouts are better than all at once. “In retrospect, we also should have done more testing with the beta group to work out any problems before we went global. Small issues became major when everyone experienced them.”

Communicate. Many good articles have been written on the subject of communication as critical to the success of CRM. Bednerik agrees - “In general, the team should communicate well internally and with “one face” to the rest of the firm. In addition, I can’t stress enough the importance of top down support. The project will fall apart if the nay-sayers and grumblers are allowed to influence the plan or be treated as exceptions.”

“Is success using all of the features in the system? Or is it having a certain level of functionality with good clean data, easily doing a mailing to a subset of contacts, reducing person-hours to process and track a project, seeing relationships, and getting nuggets out of the data (like a possible introduction)? I consider each of those a success.”

Jeff Reade is President of Cole Valley Software, Inc., makers of ContactEase CRM. He can be reached at (800)447-1712 x81 or at jeff@colevalley.com.