

A scenic landscape at sunset. A paved road curves through a hilly area. A person in a light blue shirt and dark shorts is running on the road. The sun is low on the horizon, creating a golden glow. There are birds flying in the sky. The sky is blue with some clouds. The hills are covered in green grass and some trees. The overall mood is peaceful and inspiring.

Columbus®

The guide to CRM implementations

Learn the elements of a successful CRM implementation project, from common pitfalls to avoid to whether it's better to take it in-house or outsource.

The guide to CRM implementations

The collection and management of customer data can be a time-consuming task. It's a fiddly one too, so mistakes are easy to make but you can't afford them. This is where **a good Customer Relationship Management (CRM) system can help** and likely why you've decided to invest in one or upgrade your existing system.

However, implementation projects are no walk in the park (as you probably already know). There are many intricacies to consider, from how to prepare for deployment to deciding whether it's better to assign an in-house team to the project or work with an external partner. That's what this guide is here for - to help lead you through the process.

Ready to get started?



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8 common pitfalls faced during CRM implementations and how to avoid them

When you're implementing a CRM system, there are various pitfalls you need to avoid. Here are some of the most common and how you can combat them to set your business up for a successful CRM deployment.



Not having a clear vision

Many companies set a goal to use technology to transform their processes... just to end up reproducing what they already have. The only difference is that before they were using outdated or no technology.

That's why you need to understand your business needs and processes before you start looking for your new technology (a CRM, in this case). Ask yourself: Why do you need a CRM? What problems will it solve and what do you want to accomplish?

Know why your business needs a CRM and the issues it can help resolve, and then you can set a clear vision for growth.





02

Not considering all of your users, from leadership to everyday

The most successful implementations (CRM or otherwise) are those that consider users at all levels.

This highlights the need for effective change management as any shift in the way your business operates will affect your team. So, think about everyone who might need to use the CRM and how your choice of system will impact them. Then think about which people might be affected by the implementation project, whether it's because they're on the project or because someone they need is on the project.

With this in mind, you can establish goals that everyone can have a vested interest in.

03

Not getting your team's buy-in

Speaking of goals that everyone has a vested interest in, this is key if you're to get your team on-board with the project. And team buy-in (at all levels) is key to your project's success. Why? Well, how can the project run smoothly if there are people who might resist?

Get your team's approval by ensuring they're kept in the loop throughout the whole project. A great way is to invite key members from each team

(who will be impacted by the implementation) to the initial planning meetings.

Getting their input right from the start helps them feel more valued and involved which sets the tone for the rest of the project.



Choosing the wrong CRM and/or vendor

There are so many CRM options out there. Which type of CRM do you pick, for example, cloud-based SaaS vs on-premise? Or how do you narrow down the vendors??

Vet your options by examining your business needs and seeing how the new CRM fits into your existing processes. We cover this in more detail in [this blog](#).



Having an implementation team made up of your senior executives

To maximise the benefits of your CRM, you need to implement it properly and part of that is assigning the right team to the task.

Always choose by ability rather than job title (which may seem like basic advice but you'd be surprised at how easy it is to overlook) because your senior/management team may know how the business works but they may not know the specifics of how the business works. Your everyday users will have more knowledge of that because they work with it, day in and day out.





Another thing to consider is your team's capacity. No matter their level of seniority, will they have enough time to commit to an implementation project? This is where outsourcing seems to be a more viable option. We'll cover this in more detail in a later section.

06

Not having a clear implementation plan

Take too long and people lose interest and motivation. Do it too quickly and you could overwhelm your team and errors can slip through the cracks.

Combat this by planning your rollout in stages. This ensures large groups of users aren't affected in one go and you can train in small teams before moving to the next stage.

07

Underestimating the user adoption challenge

Speaking of training, you should ensure your teams receive the training and support they need to get to grips with the new system. This is key to successful change management and implementation.

For example, your marketing team may need training on how to segment contacts and use lead scoring models, while your sales team may need to be

shown the new tools that can enhance their close rates.

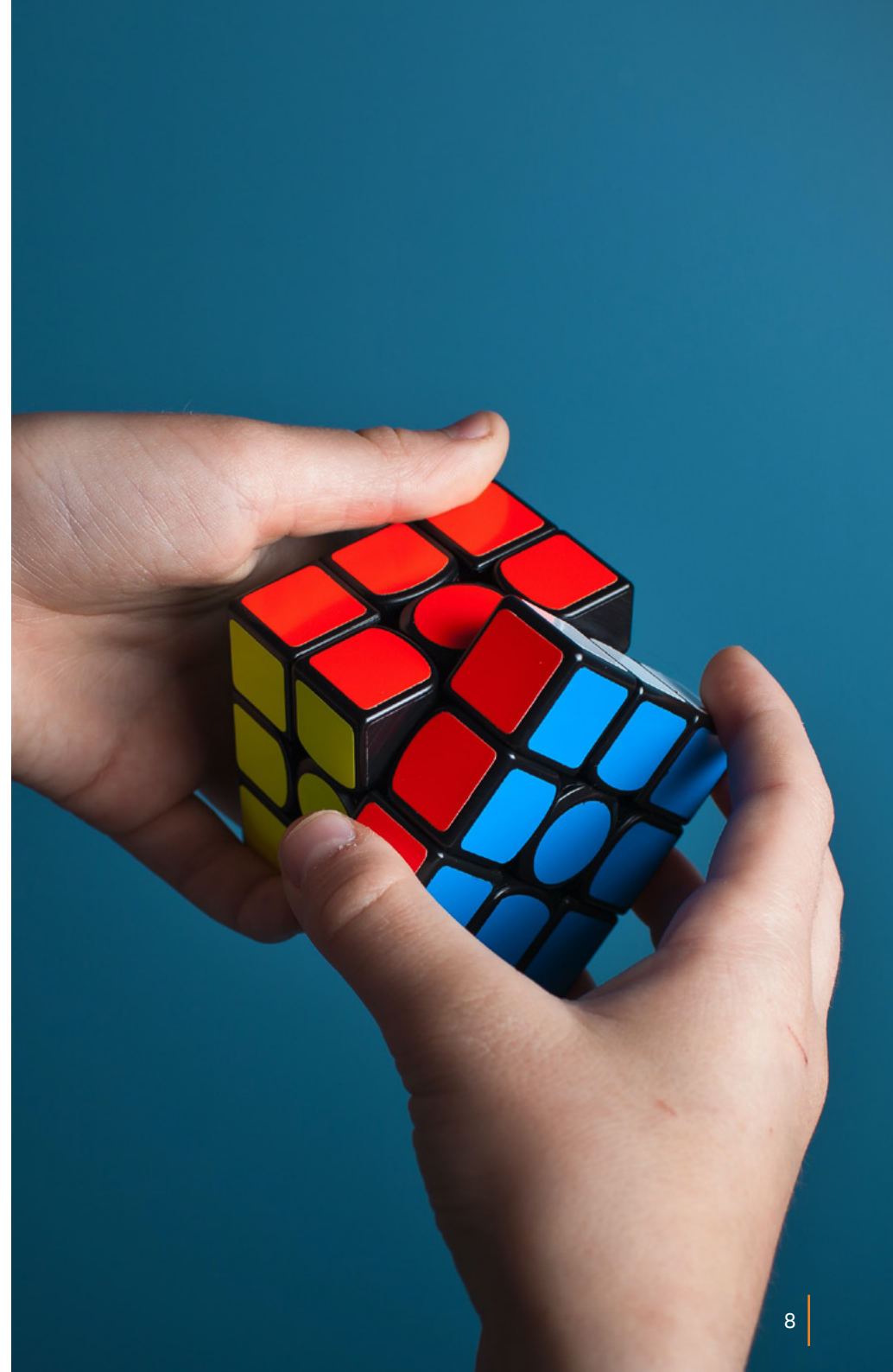
This shouldn't be a one-off training session either. To stay ahead of the competition, your CRM needs to be updated and your teams should be learning new tricks and features to improve their efficiency and performance.



Seeing CRM technology as the answer to all your problems

A CRM system can help you enhance team productivity, improve overall efficiency and achieve greater ROI. But it's just a tool which you have to use properly - it can't produce results on its own.

Always remember that technology is just one wheel of the tricycle that represents business growth. The other two are people and process. This means you need to focus on all three to achieve true success. Make sure your teams understand this.






Outsourcing vs in-house: Which is better for a implementation?


When you're implementing a CRM system, choosing the right technology and following best practices won't ensure success. You also need to assign the tasks associated with the implementation project to the right team. One of the biggest debates is outsourcing vs in-house. Let's compare the pros and cons for both.


Keeping your implementation in-house


This is where you have a team of specialists within your company and rely on them to execute the implementation. In this case, the responsibilities of recruitment, training and management of the project and the team will lie completely with you.

Pros

 **You have complete control** - from choosing who you have on the project to how you execute tasks, you literally have 100% control when you keep implementation in-house.

 **You can start work immediately, in theory** - once you've chosen your team, in theory, you can start work as soon as you want to. As long as you had the talent in-house, of course, otherwise you'll have to train employees or recruit them.


 **You have deeper understanding of your business** - when you keep it in-house, your teams will naturally have greater knowledge of your business and its exact needs and processes. Your employees live and breathe it every day, after all.


 **You can develop your talent** - whether you were lucky enough to have the talent in-house or not, implementation projects give you the chance to develop your employees. They gain new skills and personal growth which boosts employee satisfaction.








Cons

 **You're responsible for creating the team** - Keep it in-house and the task of building the ideal implementation team lies with you. If you don't already have a team of implementation specialists waiting in the wings, you'll have to hire them.

 **You're responsible for the team** - from managing their workloads and ensuring their regular tasks have been redistributed among your non-implementation employees, these tasks are in your hands. This also includes managing absences and ensuring everyone is working as productively and effectively as possible.

 **You're responsible for managing the project** - as well as managing the team, you're also responsible for the project's success. For example, if a member of your implementation team is off work, you must provide a buffer for this to prevent delays. If an aspect of the process isn't quite working out, you're responsible for coming up with a solution.


 **It's expensive** - in-house projects aren't cheap. Some example costs are recruitment, salaries, equipping the workplace for every new employee and investing in hardware and software for the implementation.


 **It's time-consuming** - every hour that your implementation team spends on the project is an hour they're not spending on their other tasks (assuming that you don't have a dedicated team). And implementation projects aren't short either - they can take months, even years.


Outsourcing your implementation


This is where you turn to an external company to take care of your implementation. A digital consultancy, Managed Service Provider (MSP) - there are several names they may go by but either way, you'll be partnering with this company and working closely with their dedicated team of specialists before, during and after the project.




 **You don't need to hire new employees** - with outsourcing, there's no need to recruit top in-house specialists. This means you can eliminate all the costs associated with recruitment and there's no need to pay additional salaries. Which leads us onto the next point...

 **You gain access to an exclusive talent pool** - the best consultancies/MSPs have years of experience in implementation projects, across a variety of sectors and types of systems. So, when you partner with one, you gain access to their exclusive talent pool who then become an extension of your team, giving you a competitive advantage.


 **It's easy to find a team that's the right fit** - if you don't like the quality of the team your consultancy/MSP has dedicated to you or they're not the right fit for whatever reason, it's relatively easy to request a new team or find a new partner. This swap is more difficult with an in-house team due to factors like following the appropriate dismissal procedure and recruitment.


 **It's often more cost-effective** - with outsourcing, there's no need to recruit your own specialists or invest in new equipment. Instead, you enter a contract with a consultancy/MSP and pay the agreed fee rather than the salaries of each individual employee.


 **They handle the implementation so you get time back** - outsourcing means you don't need to worry about the ins and outs of the project. You formulate the strategy with the consultancy/MSP in the initial planning meetings and they execute it. Less implementing for you and your team means more time to spend on other tasks.



Cons

 **They may not know your business as well as you do** - because an outsourced team isn't part of your company, they may not know the ins and outs of your business the way you and your internal teams do. However, the best consultancies/MSPs will always take the time to get to know your business and you're still involved throughout the process so you can advise where you see fit.

 **You don't have total control** - like the above, because an outsourced team isn't actually part of your company, you may feel as though as you don't have total control over the project (in comparison to keeping it in-house). But, the best partners ensure that you are still in charge. Nothing should happen without your approval and you're very much involved in formulating the strategies.

 **There may be communication delays** - it might be more challenging to get a hold of an outsourced team member than if they were in-house due to back-and-forth emails and conflicting schedules getting in the way of meetings. Though, if you had a global team, it could be just as difficult in-house. It's easy to combat this by choosing the right team and considering time zones.

So, which is better? Actually, there's no winner or loser. Both approaches are viable options and it depends on what's best for your business needs. If your business has the resources to hire implementation specialists and manage the whole process in-house and the nature of your operations means it's more efficient to control all the processes, keep it in-house. If you don't have the resources or expertise and you're not opposed to working with a third party, outsource.

6 questions you need to ask when choosing a CRM implementation partner

Here are some of the questions you should be asking when you're looking for and picking the right digital business consultancy to partner with.



01

How experienced are they in what I need?

The more experience a consultancy has across the board, from their basic solutions knowledge and recommendations to implementations, the better. A read of their success stories and case studies can reveal a lot about their service and experience.

02

Are they experienced in my industry?

The more industry knowledge a consultancy has, the more confidently they can follow best practices and troubleshoot, when necessary. The best and highest quality consultancies will have years of experience in a range of industries. Again, take a look at their success stories and case studies.

03

How reputable are they?

Client testimonials, awards and accolades say a lot about a consultancy. The best should be recognised for their successes by way of excellent reviews and awards from reputable bodies.





04

Can they offer 24/7 support?

Issues can happen at any time – they aren't limited to working hours. The right consultancy will offer 24/7 support so they'll be watching your systems and checking they're operating as they should even when you're not online. They'll take a proactive approach, rather than reactive.

05

Do they offer a holistic service, such as a wide range of solutions?

The right consultancy will offer a range of solutions rather than a limited package because they want you to benefit from a better service. It's not about what they think is best, it's what they think is best for you.

06

Does their business culture match with mine?

If you're going to be closely working with another business, their culture and yours need to click. So, pay attention to how they work and see if it'll fit with your business/team's way of thinking.

The Columbus difference

At Columbus, our vision is to be the preferred service provider of digital business solutions globally. Our mission is help companies transform, maximise and futureproof their business. And we've been doing that since 1989, with more than 2,000 employees serving over 5,000 customers worldwide. What does this mean for you?

- Access to consultants with over 30 years of experience in a range of industries
- Specialists who become an extension of your team
- Advice from the two-time winner of the Microsoft Dynamics' Partner of the Year award
- 24/7 support
- Working with a company that prides itself on close-knit team relationships and family-like culture

Interested in finding out more about what we can do for your business?
Click the button below to reach out to us today.

Contact us



Contact:

Do you want to know more about how we can help you?

 +44(0)115 990 2200

 MarketingUK@columbusglobal.com

About Columbus

Columbus is a global IT services and consulting corporation with more than 2,000 employees serving our customers worldwide. We bring digital transformation into your business and position you to thrive far into the future.

We are experts in designing, developing, implementing, upgrading and maintaining digital business applications that help your business succeed in the digital transformation. Our consultants have experience in developing businesses in many different industries all over the world.

We offer a comprehensive solution portfolio with deep industry knowledge, extensive technology expertise and profound customer insight. We have proven this through 30 years of experience serving more than 5,000 customers worldwide.

Let us help you realise the full potential of your business.