Is it Worth it?

A lot of cash goes into customer relationship manager software, but that doesn't mean it gets used

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Q: *Do you have any best practices regarding our sales professionals using our customer relationship manager (CRM) software more effectively? —Tom Roberts, vice president, Sunflower Group*

A: CRM software is only as good as the people using it. More often than not, companies spend tens of thousands of dollars only to have their sale professionals not use it, which creates two headaches for the person who wrote the check.

Two main reasons management purchases CRM software are to:

- easily track key performance indicators by sales professionals
- document prospect and client conversations/progress by account

Two main reasons sales professionals don't use CRM are it:

- often takes a lot of time to input all the data
- sometimes feels as if management is micromanaging them

One best practice is to start small and allow your sales folks to experience success keeping up with the data. Then gradually add additional, meaningful data once they are more competent with the program.

Another best practice is to brainstorm with your sales folks as to what they want to track and why. Now management is not bearing down on them and they can mastermind how this tool can help them.

Finally, rather than someone from IT conducting the training, have your sales professionals take turns showing how and why they use the CRM. This will accomplish proficiency, hone leadership skills and provide peer pressure of the good kind.

CONNECT

Have a question for Dan?

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Q: *I have sales management and operations responsibilities at my company. Depending on the workload, I sometimes feel out of balance. Any suggestions? —Kurtis Threlkeld, sales manager, Bob Hamilton Plumbing*

A: Your question reminds me of the many entrepreneurs I work with. It can feel like you are attempting to spin multiple plates on a stick at the same time.

I would suggest you use the "Ben Franklin method" of drawing a line down the middle of a piece of paper, and on one side list all the key performance indicators (KPI) as a sales manager and on the other side, list the operations KPIs.

Then, prioritize the top three areas on each side. Based on your priorities, begin scheduling time each week or possibly each day to work on these areas.

I would suggest you schedule time based on your attention span. If you get bored easily, I would schedule shorter times (15-30 minutes), especially in the beginning. If you tend to do better with longer periods of uninterrupted work, schedule an hour or longer.

The key is to not only schedule what is important to you, but honor it. So if someone calls to meet with you, you'll kindly let them know you have another commitment for that time.

You have probably heard that you can tell what's important to someone by what is listed in their calendar and in their checkbook. The other added benefit to being a better scheduler is you'll be modeling this behavior to your sales professionals. They too will be more effective in their sales efforts by scheduling time for their KPIs. **KCB**