

# Must-Do Tips No 32: Seeing CRM Work

Stating a commitment to building better and more mutually beneficial client relationships is one thing. Doing it successfully is another. We have watched well-meaning client teams derive significant benefit from analysing their relationships and planning for what they will do...and then achieve little or nothing. Why? This month we identify three of the main pitfalls for CRM implementation and how to overcome them.

## Tip 1 – waste woolly aims

The start-point for effective action is to know clearly what you have to achieve. So when the team states that it will do something like: "Build better relationships with key decision makers" and leaves it at that, you know you are in trouble. Do not let them get away with such woolliness. Ask and get answers to all the 5WH questions (Who, What, When, Where, Why, How) and get them to commit to these detailed aims - as a team and as individuals.

## Tip 2 – avoid loose accountability

So we've got some decent aims, but still it may well not happen. In our experience, the professional mind-set will find all sorts of ways to prioritise fee-earning activity over anything else that does not pay, and that anyway professionals find more difficult than the pleasure of indulging in their particular specialism. The best way that we know to create accountability for client relationship work is to build it into EVERYBODY'S bonus-worthy objectives – from top to bottom – and then to monitor and control this as rigorously as fee-earning. Of course, to work this requires excellent leadership....

## Tip 3 – ravage rotten leadership

...which is where the best-laid plans often fail. Typically, this is partners who sign up to the CRM initiative and then, by their every (in)action, show that they do not believe in it or want it. Everybody else takes their lead and that's it – until the same partners take the time to diss the initiative for its "lack of achievement". Such dysfunctional behaviour is beloved of some. Tune your radar, seek out these saboteurs and exclude them wherever possible. Choose your advocates and their clients for the initiative, and trumpet their successes loudly.

Making CRM work is not easy. For more information on how you can get help, hit 'Reply' and type **CRM Implementation**. For more general information about what we do, go to [www.peoplescope.com](http://www.peoplescope.com).



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Best regards.

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