

# 10 Steps to CRM Success

## 1 Identify the right people, and define roles and responsibilities

Achieve good governance by selecting the right people and ensuring they understand their responsibilities.

## 2 Understand your current processes

Know how your processes, including your customer touchpoints, currently work, so you can identify what's required.

## 3 Select an implementation partner who understands your industry

Save time explaining your industry and take advantage of best practice knowledge and insights.

## 4 Audit your current data to determine everything that's in scope

Collect data purposefully to reduce the risk of errors and noncompliance.

## 5 Analyse business rules both for data mapping and ongoing quality

Plan the work, then work the plan to keep costs low and deadlines met.

## 6 Cleanse and verify your data, including deduplication and error correction

The cost of dirty data can reach into the tens of thousands, per campaign!

## 7 Enable your team through requirements gathering and workshops

Get your team excited, collate their feedback, and demo the new system!

## 8 Test your system, train your people and establish reporting routines

Guarantee employee engagement and accelerate their familiarity with your new CRM.

## 9 Go-Live time!

Be ready to enable your business to achieve more.

## 10 Enhance the data to get the most out of your CRM

Identify outdated records, identify lookalike supporters, and overlay demographic segmentation.