Keeping on top of your CRM

Top tips for a tip top system

You've got a CRM. It could be a sparkly new installation or an old faithful friend (or sometimes foe?). It's all yours to look after. It's primed to deliver a whole pile of benefits and relationships and data.

So, how are you going to look after it and make sure your system stays in tip-top shape? Our top tips will help you stay on top of what might feel like a herculean task.

Tip 1   Stay calm!

You've either spent time preparing for the day your tool is handed over to you to use, or been building up to the task of taking over a system. You've been trained; your team are trained. You've got bags of experience or someone wouldn't have asked you to take it on (really, they wouldn't't). You are ready for this! Stay calm. Pep talk over. Let's get to the nitty gritty!

Tip 2   A CRM is for life not just a few years

Typically, the average 'old style' (server under the stairs, not accessible via anything other than desktop etc) databases had a life-span of about 5-10 years for most organisations, with 7 being about average. So every few years you got a chance to 'start afresh' and clear out old mistakes and train up the team to take on a new task.

The new way of working via cloud, multiple device and log-on is more flexible. Because updates are more frequent via most systems, and adding integrations is so simple, what we are looking at now is potentially a CRM for life.

So we need a new approach to managing our systems. While we all embrace the concept that failure often leads to success with regard to campaigns and 'having a go' is a good thing to do, I'd argue the one place this theory does not apply is with your CRM. This is people's personal data we're talking about and it holds some of the keys to how your organisation can grow and develop.

Our approach to looking after it needs to be one of ongoing consolidation, training and development. It's very easy to become complacent about something that's in front of you all the time. It's your job as its key champion not to let that happen. Everything from making sure documentation you have to support users is kept up to date, new staff are trained properly, and other users are supported properly will mean your tenure as 'keeper' of the CRM means it's in good healthy shape for what lies ahead.

*apologies to the Dogs Trust for ripping off their messaging

Tip 3   Be on hand to help, monitor and manage

Whether you've been using a system for years or are making the switch, it's a universal truth that changing the way we work is not easy and takes time - we may not even realise we're doing something 'wrong' because 'we've always done it like that'.

Pick people up on any issues you see in how they enter data, update records or manipulate data politely and with respect. Take the time to explain why something you found is an issue and needs to be addressed – not everyone will see the bigger picture of why a rogue capitalisation or mis-entering of figures makes a difference to a report or mail list they never see or work on.

Be on hand to offer refresher training, one to one support, team updates, and discussions and snag sessions. If your system is new, keep a really close eye on things in the first few months so you can jump in where you are needed.

Produce documentation or resources that will help people understand how they can get benefit from the system – as well as all the practical bits like how to do x or y. It does help to know that by entering item a) correctly, the fundraising manager can tell us that this is a successful campaign and we'll do it again or won't and will save our money for something else which works better.

Make sure any protocols or processes are clearly documented and communicated to system users so they can help themselves to develop their expertise – lots of people are keen to learn more and do their best but might not be able to schedule time in for more formal trainings. Helpng them figure things out for themselves is in your best interests and will boost confidence in using the system.

Perhaps our best advice is that it is useful to remind users that data = people and those people are their supporting community. Our experience is that this helps people think of using the system as looking after their supporters, rather than 'data'.

Tip 4 Stay enthused about CRM

The CRM landscape we work in changes all the time – new tech, new programmes, new opportunities. Not all of these will be relevant to you, but it's important to keep an eye on the trends, innovations and updates that take place. Find a blog you trust (this one is a great start!), and just scan it every week or so. Keep in touch with your implementation partner or vendor – some may offer ongoing training or updates for clients. Find ways to keep up with the new, fresh and exciting things going on – it will help you maintain your enthusiasm about the system – and vitally what it can do for you - and prevent it feeling like 'just something else' you need to keep an eye on.

Tip 5 Never shut up. Well, ok. Don't be quiet all the time.

You might not have anything to say every month, but you should make sure CRM stays firmly on the agenda. Just one reason for this is to thank those that work on the system for the great job they're doing. The other reason is to ensure everyone knows where they can turn to for help and support.

And then, it's about developing trust in the data, confidence and a deeper understanding of the benefit of using the system – these sessions are your chance to share the results and positive differences that are happening across the organisation. Share other people's results and positive stories.

For example, you could have found that in a trial of two types of appeal wording, one was more successful than the other. The data entry enables you to find out the totals and work out response rates. So in future we could generate x% more funds, just by changing some wording on a letter. Your colleagues like this. Typically you all work together because you support a cause. And more income to support a cause they care about is a good, positive message. All because they typed some data into the CRM rather than not bothering. This stuff matters – show them why and what you're able to do with the information.

Don't let CRM be forgotten – it is one of the tools at the heart of your organisation. Find ways to champion its use and make it friendly, interesting and approachable – rather than a dull requirement.

Make sure you are able to champion the system to new users, too. When a new employee joins – or someone transferring in from another team or area of the organisation –you need to support them to use the system right from the start. Think about a step-by-step induction process that you can add to all new employee agendas - a mix of 1:1 sessions, a guided self-learn process using all your documentation and a mix of videos and presentations you have recorded are all effective ways. Take time to find out how the individual will mainly use the system and start there to keep it relevant for them.

Tip 6 Keep it tidy and fit for purpose

Remember the sorry mess of data you had bCRM (before CRM)? I think we can all agree it's best not to let things get out of hand again. But experience also tells us that vital tasks like looking after your data can slip down the priorities list as we get distracted by other new, shiny and exciting things. Don't let that happen (again) – make a plan.

Our expert advice – based on multiple implementations and client's experience - is to

- Regularly remind staff and offer ad hoc training on key issues (see tip 5)
- Run regular reports to find orphan and duplicate data (this can help with tip 3)
- Use de-duplication apps to help pick up duplicates
- Keep an eye on your data retention – what can you retain once you have stopped doing business with a client or stakeholder? How are your permission managements working?
- When planning your work schedule, allocate resource and time to help keep the data clean (prevent) and work on it when issues are identified (cure).
- Do not assume that data that is purchased from external agencies is up to date or clean
- Keep an eye on all data sources across the organisation – are there sources that aren't making it into the CRM? If not, why not?

A helpful way of looking at this is to think of the cost of cleaning data not so much in terms of a financial IT overhead but in terms of the cost of keeping your clients happy and staying on the right side of legislation.

Tip 7 Health checks

Just as you will occasionally seek medical advice if there's something wrong, you can do the same with your CRM. If you have an issue, call the partner who helped you install it or find someone who works with the system you are using and ask them for help. Healthcare is about prevention as well as cure.

An investment in the health of your system will help keep it working smoothly – and if you don't have the time or expertise to manage it in house, you will need to recognise and allocate an ongoing sum to seek the help you need. You've invested a lot of time and money in the system – it will pay you dividends if you look after it and use it properly; don't forget to protect your asset.