Earning Leadership's Buy-in to CRM

by Emy Burback

We are in the people business. No matter what area of A/E/C you are in, you win work based on your relationships, which are developed and strengthened through your reputation and experience. CRM (Client Relationship Management), is a tool that helps you manage those relationships and maximize efforts to win more work.

If your firm doesn't use a CRM, the system can help you collaborate, strengthen client relationships, and better track upcoming opportunities. Or, you may have a CRM that is underutilized, if used at all, and you're wondering if you have the right system for your firm. Whatever your situation, the challenges are the same: How can we earn and maintain leadership buy-in to the importance of a CRM to ensure that it's used consistently at all levels in the firm and are we maximizing the power of the CRM to it's fullest potential? As with most business initiatives, if leadership isn't supportive, there's likely no accountability or reason for your team to participate.

Before you put together a PowerPoint highlighting all the right reasons you need a CRM, I encourage you to take a step back and conduct due diligence. This process helps you form your pitch and provides a better understanding of your firm and team needs. If leadership doesn't see the value, they won't see the need. Your goal is understanding what they value, what the business needs are, and presenting solutions that fulfill both.

Below are my top tips to earn leadership buy-in and, in turn, successfully choose and implement a CRM system that best meets the needs of your firm.

ABOUT EMY BURBACK

Emy brings more than 18 years' experience in marketing professional services in both the public and private sectors. An entrepreneur, she is passionate about developing and implementing marketing and business strategies to "make business better" through more efficient operations and targeted marketing and business development efforts. The results... greater success! Contact Emy at: emy@marketingengine.biz

ABOUT ELEVATE MARKETING ADVISORS

Elevate Marketing Advisors develops marketing and business development campaigns to invigorate your brand, differentiate your firm, and drive business to your bottom line so you stay focused on design and delivery of your discipline.

Elevate is driven to help people and firms realize their beyond through relationship, advocacy, and an elevated client experience. We do this through a daily commitment to our guiding principles:

- Empower Disruption.
- Reach. Then Reach Higher.
- Make a Difference Every Day.
- Have Fun and Kick Ass!

Tips to Earning Leadership Buy-In

Understand and document your business process. Research is the foundation and first step before making any important business decision. CRM is no exception. Research how your firm builds its business and document the business development process. Answer a series of questions including:

- How does the firm currently manage client and potential teaming relationships? Are there department leads, business developers, or seller-doers who are responsible for particular clients or markets?
- What is the capture planning process, and does it vary by client vs. a project lead?
- How are opportunities tracked? By the way, there might be a plethora of spreadsheets roaming around that individuals currently use to track progress. Review these. What pieces of information do they capture? Does this uncover what is valuable and can this information prove useful later when you demonstrate how a system can deliver the same results in a better way?
- How does your firm measure success and set goals? Is it against market sectors or by clients?

By answering these and similar questions, you'll uncover what's important to leadership and understand how you win work – all critical when finding a system that aligns with your business process. Next, document the process. There are many samples of process maps you can use as a guide and then customize for your firm's needs. By going through this exercise, you'll identify opportunities to create efficiencies. Additionally, creating a visual representation of the process will guide a more organized, thorough conversation with leadership. It's also a starting point for collaboration. Fine-tune the process with your team and activate a thorough business process for your firm. In the end, you'll have a document that your business can live by, do business by, and train by accordingly.

Consider overall business solutions. Query all departments in your firm to determine if they need better business solutions? For example, if your Accounting Department is considering a new ERP (enterprise resource planning), accounting, or project management system, use that as an opportunity to collaborate to find a solution that meets all needs. There are advantages and efficiencies obtained when your IT stack integrates.

Check references. Talk to industry colleagues, respected teaming partners, marketing consultants, and even friendly competitors to learn what CRM they use and why. What do they like or dislike about their program? How individual firms use their CRM differs, so don't worry too much that you're asking about trade secrets. Your goal is to uncover what a system actually does or doesn't do after implementation. Word of mouth is often a reliable marketing tool – use it as part of your research.

Be realistic with time frames. It takes time to comprehensively collect the necessary information to make a solid CRM business decisions. And, once you do, finding the right system for your needs, negotiating terms, and implementing (and training) your team is a long process. Even if you already have a CRM, you may find yourself re-training and fine-tuning your system. Be patient and trust the process.

The goal of having a CRM is to make better business decisions, more effectively manage your relationships, and better track your pursuits. Take the time to research, get informed, and gather facts and you'll have a more productive conversation as you present the benefits of CRM for to your firm's leadership.

Want more?

Emy has successfully presented at SMPS events and directly to leadership teams on making a CRM system work best for your firm. She welcomes the opportunity to support you in having a more successful conversation with leadership and is always willing to offer advice, brainstorm on the best approach, or present a customized presentation on CRM best practices as firms explore choosing a CRM or optimizing what they have. She has implemented CRM for over 80 clients and has on-going support and training programs to ensure firms are successful in using a CRM. Her goal is to help firms be more successful and win more work.