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Nurturing your CRM Program: Growing from Infancy to Adulthood

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Imagine what would have happened if we had all been treated like adults from birth. No assistance or guidance: just expectations that are challenging to meet. We wouldn't have gotten very far and others may have been disappointed by our lack of progress. The technology and processes we use day to day, such as our CRM programs, need the same care and attention to flourish, just as we did in our own infancy, so they can provide the best experience possible for users, customers and the company overall.

The Infancy Stage

At the very start of its life, a brand new CRM system and program will inspire energy and enthusiasm for a bright future: something really exciting has arrived. Naturally, it will need lots of attention as it is introduced. Positive encouragement will help with user adoption, and regular check-ups around data quality, compliance and usage make sure it is developing in the right direction into a healthy system. During the infancy stage, the basics of the system will be mastered – with a few late night feedings and hiccups only to be expected along the way.

The Adolescent Stage

Now the program has been established and users have mastered a core set of skills, it is time to start school and introduce some challenges. They absolutely shouldn't be adult-sized challenges: they have to be appropriate for the development of the program. We wouldn't ask a group of school children to read War and Peace before mastering the ABCs.

This is the right time to start evolving processes to the next level of complexity in terms of steps, tasks and requirements and asking the system to provide insight back to the business, to see what has been learned.

Management should lead by example and show how CRM can be used to run the business, giving users a role model by standing at the front of the class.

Now that it is has reached adolescence, the program has already been built into the culture of the organization, but there can be a danger of complacency now that everything is up, running and working for the company. It is really key that leaders, especially the executive owners of a CRM program, keep setting the homework and the users keep turning it in.

The Teenage Years

Often known as the most rebellious years, this is when an organization needs to start showing the business value and impact of the CRM program. If the users and customers see no value, they will start questioning why they are still using the system and whether the investment has been worth it.

Teenagers don't want to be force fed – they want to be able to challenge the system. If their bike no longer needs training wheels, despite them being there from the very beginning: take them off. If a process that was introduced in the CRM program's infancy stage is no longer an efficient one: it needs changing.

This is the stage in a CRM program's life when it could become disillusioning. The glitz and glamour of a new arrival has worn off, and the daily grind has set in. The executive owners need to show they are just as invigorated and energised as the first time they saw the program, providing focus and investment and securing user buy-in, allowing the program to keep moving onwards and upwards.

Adulthood
Now that the program has reached adulthood, it's time to expand. The changes and developments in this stage will be much less radical, but will have just as much impact. They can be made according to taste and preference – for example, if you start out with a sales automation program, this is the stage at which to bring in marketing automation that would provide richer visibility of prospect relationships. And just because the program has developed into a well-adjusted, popular member of the organization doesn't mean that expansion and growth have to stop. Your industry and customers are constantly evolving, and your CRM program should evolve in sync.

How will you know when it's ready?
Just like all children, adolescents, teenagers and adults, CRM programs will develop at different times. There is certainly no set timeframe as to when your program should fall into one of the above stages. The time it takes to progress and evolve will depend on how you as a business implement the changes, as well as managing the processes, technology and people along with it. It will also be based on your customer ecosystem and the speed of your industry.

There could also be a danger of rushing your CRM program to evolve before it, and its users, are ready. We wouldn't give children sharp utensils to eat with when they are very small: the same way we wouldn't equip CRM users with tools that are too advanced for the stage they are at. On the other hand, the program should not be stifled when it is ready to move on. Wrapping it up in cotton wool in its infancy may preserve the existing functionality, but it will be left far behind as competitors and other aspects of the business get their driving permits and aim for the horizon.

Determine Your Stage and Take Action
In order to find out what stage organizations are at regarding their CRM program, they need to go through a critical self-evaluation. Three elements that need to be considered are:
1. User sophistication
2. Process definition
3. Supporting Technology

Challenging and evaluating a CRM program across the three elements above, along with the four growth stages, will help to highlight any gaps: such as the users are at their rebellious, teenage stage but the system is still in its infancy. The first goal is to make sure everyone is on the same page before making steps forward, and then to have a clear roadmap to advance and evolve the entire program with all elements in synch.

Expecting a CRM program to have intelligent and well-established processes right from day one is a set up for disaster. Making sure it's nurtured and well cared for as it grows with your company will make sure it provides everyone from executive owners, through users, to customers, with the experience and service they expect and deserve.