

blog post | 29 November 2016

## Don't 'do CRM' to your firm

Guest writer, BD and Change Management Consultant Dan Bright explores how firms can implement truly successful CRM programmes ? and explains why investing in a CRM system isn't enough.

Firms often implement CRM systems to ?initiate? change in the way they manage client relationships, hoping that the new software alone will pump out new work. Before ?doing CRM? to the firm, it's worth taking a step back to determine whether the firm's culture is ready or even willing!

Change requires a concerted effort to break or evolve a longstanding habit ? people must see that the ?pain? of maintaining a habit is greater than trying the new one. And it's the same for using new technology. Simply rolling out a piece of CRM technology is unlikely to make a difference in the way you manage clients. A ?case for change? needs to be something people relate to and understand.

### Your starting point

Formulating a case for change requires honest introspection about ?how things are done? as well as where you want to go. Vigorously questioning how your firm co-ordinates client interactions, how well you listen to clients, how you collaborate internally, and so on, goes a long way to understanding the inherent client-focused culture in the firm. It's important to realistically judge the firm's genuine readiness for a new system before investing time and money in it.

Jaguar developed a firm-wide change programme to guarantee world class performance in its production systems. This included a strategic vision, process re-design and a comprehensive change and engagement strategy. The successful programme, which has been running now for years, has resulted in a transformation of the company and has re-established Jaguar as a premium vehicle manufacturer.

Your CRM implementation may not have such high objectives, but positioning your CRM to help ?connect the firm internally?, understand the sectors clients operate in or enable the firm to present the organisation in a joined-up manner to clients, will motivate people more ? as opposed to stating that in six months all the firm's 100,000 contacts will be in the CRM system.

### A firm-wide initiative

Additionally, most change initiatives are successful if there is senior management buy-in and active support from designated individuals who are passionate about the endeavour and are personally invested in the project. Again, this has to be linked to a firm-wide vision to change and tie the project to business objectives. Frequently, marketing teams are tasked solely with leading such CRM-driven programmes. Sadly the projects hardly ever reach their full potential as they are too big to do alone. CRM implementation is a firm-wide initiative, not just the responsibility of the marketing department.

But, leadership cannot simply bulldoze change through the organisation and hope that a few emails and presentations will do the trick. Establishing a CRM steering committee that is made up of a broad spectrum of the firm's stakeholders can help identify what will and won't work (culturally and technically) as well as to effectively engage and communicate the 'what, why and how' to all levels of personnel in the firm. Making users feel that the changes are 'for them' as opposed to being done 'to them' is key.

CRM adoption needs engagement with all levels of a firm from secretaries to associates, office reception to the heads of practice. It is imperative to respect people's views and to take their objections, if any, on the chin. The project leader and team needs to be visibly engaging and listening via informal coffee stops, impromptu face-to-face/one-to-one meetings to drive the 'case for change.' Also, it's worth noting that a CRM implementation is never complete. It requires continual and critical review to meet the constantly evolving needs of a firm.

People's habits and behaviours don't change instantly due to official adoption of CRM/technology. Anecdotal evidence suggests that firms that have driven CRM-related, business-orientated change from the users' perspective, are the ones who have been successful.

*Dan Bright works with individuals and firms to build practical and productive client relationship management habits. He helps firms optimise their CRM investments and focus efforts profitably. His website is [www.brightercrm.com](http://www.brightercrm.com) [1].*

Share this page:

- [Twitter](#) [2]
- [Linkedin](#) [3]
- [Facebook](#) [4]

[Top](#)

- [Privacy and Cookies](#)
- [Refer a Friend](#)
- [Sitemap](#)

---

**Source URL:** <https://www.totumpartners.com/insights/dont-do-crm-your-firm>

### Links

[1] <http://www.brightercrm.com/>

[2] <https://twitter.com/home?status=https%3A%2F%2Fwww.totumpartners.com%2Fprintpdf%2F846>

[3]

<https://www.linkedin.com/shareArticle?mini=true&url=https%3A%2F%2Fwww.totumpartners.com%2Fprintpdf%2F846>

[4]

<https://www.facebook.com/sharer/sharer.php?u=https%3A%2F%2Fwww.totumpartners.com%2Fprintpdf%2F846>