Do It Again: Getting CRM Right The Second Time

by Mike Sweeney, CPSM

Chances are that your firm's current contact management system was developed using a potent combination of off-the-shelf database software, native wit, and brute force, with plenty of time between projects for the original pioneers to correct most of their novice mistakes. But along the way, data issues that were too hidden or complex to resolve with this formula fell through the cracks.

The consequences are a system you can't trust, known "glitches" that are easier to live with than to fix, and data integrity that is less than 100%. This makes moving up to today's more sophisticated CRM systems an expensive and near-impossible dream.

Today's CRM solutions promise a simpler, more intuitive setup and can anticipate a marketer's every move through a model "sales process." This can make any previous system seem crude by comparison. But not so fast! These systems too will likely be engineered way beyond what you initially need or can quickly absorb.

You may only be able to wrangle a fraction of a new tool's features without courting disaster or holding up other assignments. CRM has made marketing operations more obviously data-driven than ever before. So you can't just hand it off to implementation consultants or the IT guy to design a total solution that works for you and your team. You have to ensure its long-term sustainability, so that you don't re-experience the same old problems in a new tool.

Here are some things to keep in mind to help you avoid making mistakes with long-term consequences:

- **Appoint a documentarian.** Keep that person updated with data issues as they arise, and ask him or her to vet your logic for solving them. This person need not be a computer science or database expert as long as they are given a good description of what they need to do, what they need to keep track of, and how the system will change. Give them sources of information (either personal or online) that they can readily consult.

- **Invest in focused, undivided attention.** Fragmented attention results in assumptions that are often wrong, hasty decisions, and incomplete execution.

- **Experiment on a copy of the live data, or a subset thereof.** In this copy, you can experiment with new data restructuring and then inventory the components that will need to be changed.

- **Embrace unique IDs.** Unique identifiers seem unnecessary at first, but they become critical after a while when buildings get renamed and client companies rebrand. "When your database suggests creating a unique ID field that it can index, don't just take the option, use it!" says Daniel Bromberg of **BaseZen Consulting**, an IT consultancy in Cambridge MA serving small creative firms and marketing organizations. "Put these identifiers into reports and invoices to improve the historical record. It will improve communications with clients on targeted issues."

- **Recognize when your data is in trouble.** "The lack of appropriate one-to-many (and then, many-to-many) relationships is the hallmark of a database that will quickly collapse under its own weight," says Bromberg. "For example, when you find an entire log of client correspondence or invoices inside a free-form text field with a 3,000-character limit, it's time to consider transitioning this information to its own structure so that you can locate real data by meaningful fields and categories."

- **Engage everyone.** An expert can create tables and relationships quickly and rewire your reports, forms, and procedural code to recognize the additional changes. But long term, it's up to you to make sure you're getting the same results you expect. Develop data maintenance practices that your team can easily perform. This helps you limit the complexity of tables and relationships to a model humans can understand.

Marketing data management is a team effort, even if only one person is the hands-on expert. Will Scarbrough, CIO of **Sasaki Associates** in Watertown, MA, is leading a CRM implementation with a cross-disciplinary team. He encourages his marketing team to designate a specialist who can be their internal resource as well as an interface with counterparts in more traditionally data-intensive departments. "At a firm-wide level, this collaborative approach ensures that data quality issues that affect marketing are recognized and resolved rapidly on a continuous improvement model," he says.

CRM has made marketing operations more obviously data-driven than ever before. Marketers now need to have the same data sophistication and self-sufficiency that accounting and human resources have long had. With CRM, marketers too can be the architects of their own fate. ●

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