CRM TIPS

TIP 1: Decide on and input due dates.

First, you must understand that for most CRMs, the task due date field represents one of these two options:
Option #1: The date represents the FINAL day that the task must be completed
Option #2: The date represents the next time the staff should review the task and make progress on moving it toward completion.

Second, your firm should review the items listed below before choosing option 1 or 2:
1. the task reports that each staff person views daily
2. the task reports that a manager uses to review all open tasks
3. staff's ability to prioritize their tasks without any guidance on the final date that the task must be completed
4. staff's ability to quickly re-prioritize their tasks on a daily and weekly basis so nothing is forgotten or delinquent

Third, please notice the CRM Traits such as:
1. the color of the due date font for past due items
2. where the due date is shown in each view
3. can the due date column be filtered to show past due first

This may seem odd to bring to your attention, but many businesses never decide if the task due date represents Option 1 or 2. This lack of clarity leads to missed deadlines, inaccurate reports, and overall frustration among the staff and management. Finally, we all know that some tasks need to be started today and might not be 100% complete for a month or two. So, you will want to be very careful about what date goes into the Due Date field, what that date represents, and communicate this protocol to all staff.

In the end, you don't want to assume that all staff can set their own due dates nor assume that staff are looking at tasks with due dates 1 month out. Starting this review and discussion now will help when you decide which COO-recommended projects you want to implement and how to properly assign these projects as tasks in the CRM.

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TIP: Write the full call to action in the subject line.
This technique reduces the time it takes to prioritize, complete, and monitor the tasks. Generic, too-short subject lines can tax your brain and energy as they force memory recall of the details of each task. They also force the person to click into the task to read the details.

Example: cash distribution
Improvement: make 2k cash distribution from taxable JNT account to Bank of America

Example: IRA to ROTH IRA
Improvement: do 100% conversion from IRA to ROTH IRA

TIP: Plan out the migration of data into new CRM thoroughly with the vendor.
You should know which data is moving, where it is moving to (what fields), when it will move, and how long you should allocate for auditing and cleaning up the data.

TIP: Complete a visualization of data flows using the Tech Integration Template.
Identifying the data flows among other software and the CRM will reduce data entry. Lean on your CRM vendor for additional ideas. Communicate the integrations, how they work to save you time, and what are the implementation steps to the team, in advance, to get buy-in.

TIP: Assign one staff person to implement and maintain the CRM.
Too many cooks in the kitchen cause a huge mess within a CRM. Having one project manager will control the quality and integrity of the data.

TIP: Choose a Champion to sell the change by explaining the benefits to the staff.
Change is difficult so staff need to be shown the benefits. Encourage the champion to show and tell the system, lean on the vendor, and communicate the benefits to the staff BEFORE you implement the software.

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TIP: Categorize all your contacts in the old CRM before migrating to a new CRM.
Any CRM will allow you to pull up a report of all contacts within a certain category; this ability makes cleanup and use of the data 10 times faster.

TIP: Create mail merge and email templates for communications you frequently send.
There is no need to waste time typing in names, addresses, or creating the same message repeatedly, from scratch.

TIP: Keep drop down field lists to a minimum.
The more choices you provide in a drop-down list, the less likely your staff will take the time to choose the right item.

TIP: Create at least 2-3 workflows and use them immediately.
Building and using workflows immediately will get buy-in, improve comfort with building, and show how they help manage the business, save time, and reduce confusion.

TIP: Communicate a policy for tracking items while data is migrating from the old to new CRM.
Communicate where to document contact changes, new tasks, edits to tasks, and so forth while in limbo land.

TIP: After implementing the CRM, provide best practices training every few weeks for 2 months.
You want to continue selling the benefits of the CRM. Allow the staff to share tips they have learned and have the project manager or champion train everyone on the proper use and shortcuts within the CRM.