

Report: What people really think about CRM

Maximise the potential of your CRM with this report on what benefits and issues companies are experiencing with their platforms across the UK.



Foreword

We've all heard the statistics; both surrounding how CRM adoption is exploding, but also around how projects don't always live up to expectations. "CRM will be at the heart of digital initiatives in coming years" according to Joanne Correia, Research Vice President at Gartner. Yet 63% of projects fail to deliver the intended benefits.

We commissioned this research to discover how British professionals really use CRM systems, and how that differs to the vendors' promises. The findings are a fascinating insight into barriers to user adoption; we've given our insights throughout into what the figures mean, and how you can counter these challenges. We hope you enjoy!

Billy Lyle, Managing Director, Redspire

Executive summary and highlights

The report's findings offer valuable insights into why 63% of CRM projects are failing to deliver on their investment. Several critical issues are highlighted that are in need of urgent attention if failure rate is to be driven down.

While nearly 60% of respondents think they are customer-centric, an analysis of their CRM operations reveals that this is not the case in many instances.

'Mind the Gap'

Only 18.75% of respondents say that CRM is used to deal with complaints.

Only 15.25% believe that their CRM platform actually benefits customers.

'Hinders, Not Helps'

CRM platforms are supposed to help companies streamline, hone and boost their operations on multiple fronts – but the amount of time being spent on maintaining the platform is proving to be a drain on employees' time.

'Lack of Faith'

To ensure a CRM platform delivers, it needs to be optimised for each and every department – but the survey reveals that 42% of respondents do not believe their CRM has been optimised to ensure they are only entering relevant data.

'Winging It'

CRM platform issues can be explained in part by a potentially flawed rollout. After all, only...

39.25% of companies hired external consultants to design their CRM system. While only 42.50% have a dedicated CRM person in-house.

Every Cloud, A Silver Lining

The headline results make for grim reading – but the survey is ultimately good news. It offers a clear roadmap to the obstacles facing businesses who wish to rollout or improve their CRM systems.

Most importantly, this survey can help companies create a CRM strategy which fully delivers on their platform's promise.

Methodology

Between 02/10/2014 - 30/10/2014, OnePoll surveyed 400 adults across the UK who use a CRM system at work. OnePoll is a member of ESOMAR and employs members of the MRS.

About Redspire

Since 2003, specialist Microsoft Dynamics CRM consultancy, Redspire, has helped organisations large and small, in a range of industries, to achieve tangible business solutions. With offices in Glasgow and London, we help UK clients including Argos, Bibby Scientific and Direct Wines to access meaningful, real-time data, allowing them to continuously improve their customer relationships.

We use our own TrueFit methodology to deliver all CRM projects. To our clients, this means:

- We work with you to establish business objectives and create a solution that will meet them.
- We roll out our business solution piece by piece to get you started quickly.
- We work with you on your site, ensuring full employee training and technical support.
- We support you after we've delivered the project to make sure everything is running smoothly.

Our services include:

- Tailored CRM and marketing automation software systems based on your requirements and business processes.
- CRM training and support.
- Pre-bundled Dynamics CRM packages.
- Data migration: from one CRM system to another.

Redspire is unique because:

- Every Redspire employee is certified in Microsoft Dynamics CRM – we all know its power and what it can do for your organisation.
- We have developed our own marketing automation platform built on Microsoft Dynamics CRM – we lead the market in helping marketing and sales teams drive profits together.
- We pride ourselves on our commitment and flexibility, building relationships with customers that continue, in some cases, a decade later.
- We're the only Microsoft Dynamics CRM partner in the UK to guarantee business results.

Our team's expertise will help you achieve significant business results.

[Get in touch today!](#)

Friend or Foe?

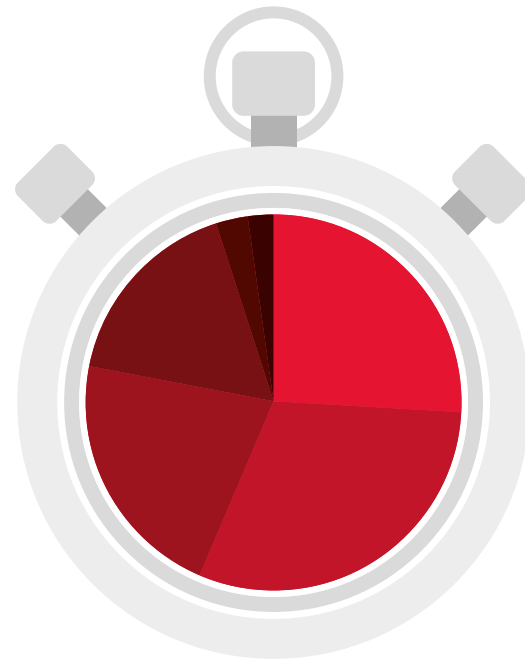
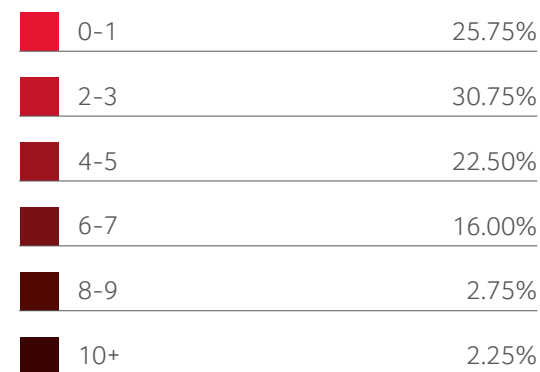
A properly-implemented CRM platform will deliver on several fronts – better customer engagement, increased sales and a streamlined work process designed to boost departmental productivity. But do companies believe they are enjoying the full benefits of their CRM investment – or could it actually be working against them?

“The amount of time spent on CRM each day will inevitably vary across different roles within the company. A telesales person may spend their whole day logged in while creating reports, while a salesperson may only use it quickly to check their pipeline. Regardless of an employee’s job role, CRM serves to make their task easier - increasing their productivity.”

Billy Lyle, Redspire

That’s a significant drain on employee time and suggests that CRM platforms have not been configured correctly. The issue could also suggest a lack of employee training about what precisely CRM can do for them, and critically what it can’t – see Section 5 (‘Education or Misinformation?’).

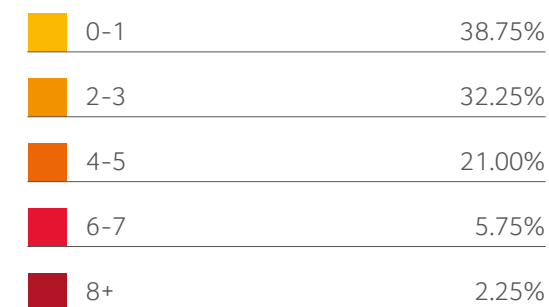
On average, how many hours a day do you spend working on your CRM system?



Average time = 3.41 hours a day



Roughly how many hours per day do you spend doing tasks that you feel your CRM could automate for you?

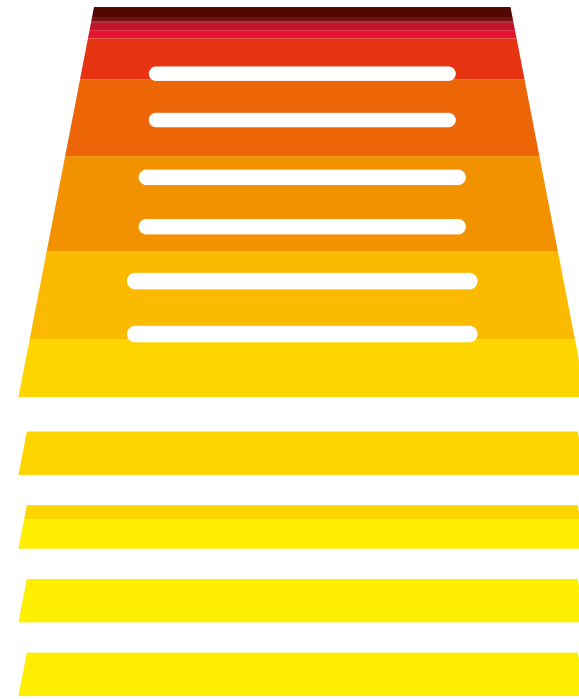



Average time = 2.5 hours a day




On average, how many hours per week do you spend gathering data for reports that your CRM could produce for you?

0-1	27.00%
2-3	21.50%
4-5	13.50%
6-10	14.50%
11-15	11.75%
16-20	6.25%
21-25	1.50%
26-30	1.50%
31-35	0.25%
36-40	0.5%
41+	1.75%



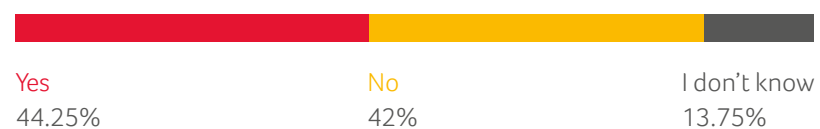


Average time = 6.85 hours a week



All three of the above results imply that employees feel that CRM is either making no difference to their workflow or efficiency and worse still, that it's working against them. It's a theme reflected by the results from the following question:

Overall, do you feel your CRM has been optimised to ensure you are only entering relevant data?



“Such a large ‘No’ response is too high and suggests the CRM platforms are compromised on a fundamental level. Perhaps most worryingly, it’s the managers who are least convinced of their system’s optimisation – they scored their CRM the lowest by a wide margin. For instance, 65.79% of Sales Managers and 52.63% of Marketing Managers don’t believe their CRM platform has been properly optimised.

But to understand this optimisation issue, it’s important to go back and look at who initially designed the CRM’s rollout and implementation.”

Billy Lyle, Redspire

Optimised or Compromised?

The planning and rollout phase of CRM implementation will dictate whether the system is a success or a failure. In other words, businesses will reap what they sow. But are companies following correct protocol – or are they falling short of the mark?

“The results reveal that too many companies are relying on a ‘let’s roll up our sleeves’ attitude to their CRM’s rollout. It’s a high risk strategy because you’re effectively operating in the dark and will invariably learn vital lessons from costly and time consuming mistakes. That’s not a wise strategy for any company – or its bottom line.”

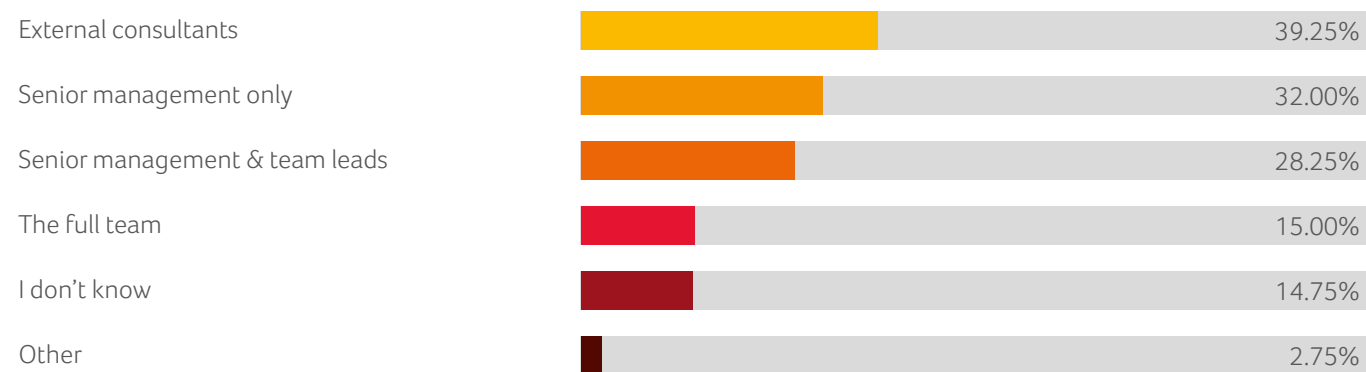
Billy Lyle, Redspire

Ominous Sign

When asked ‘Do you have a dedicated CRM person in-house?’, only 42.50% of respondents said their company did.

42.50%

Who was involved in the design of your CRM system?



Overall, do you feel the person/people designing the CRM understood your role and what was important to you?

Yes
50.50%



No
49.50%

40%

Implementing and optimising a CRM system is an exacting task and is work that should be undertaken by external third party consultants. Some 40% of companies surveyed understand their importance – or by hiring in a full-time in-house specialist whose sole role will be to design, implement and maintain your CRM on an ongoing basis.

“That’s a significant percentage of employees who feel misunderstood. To deal with this, it’s imperative that employers foster an environment where staff can express their concerns and doubts about the company’s CRM so any issues can be identified and solutions found. If you don’t, you risk employees taking a ‘backseat’, disinterested attitude to exploiting the full potential of your CRM platform.”

Billy Lyle, Redspire

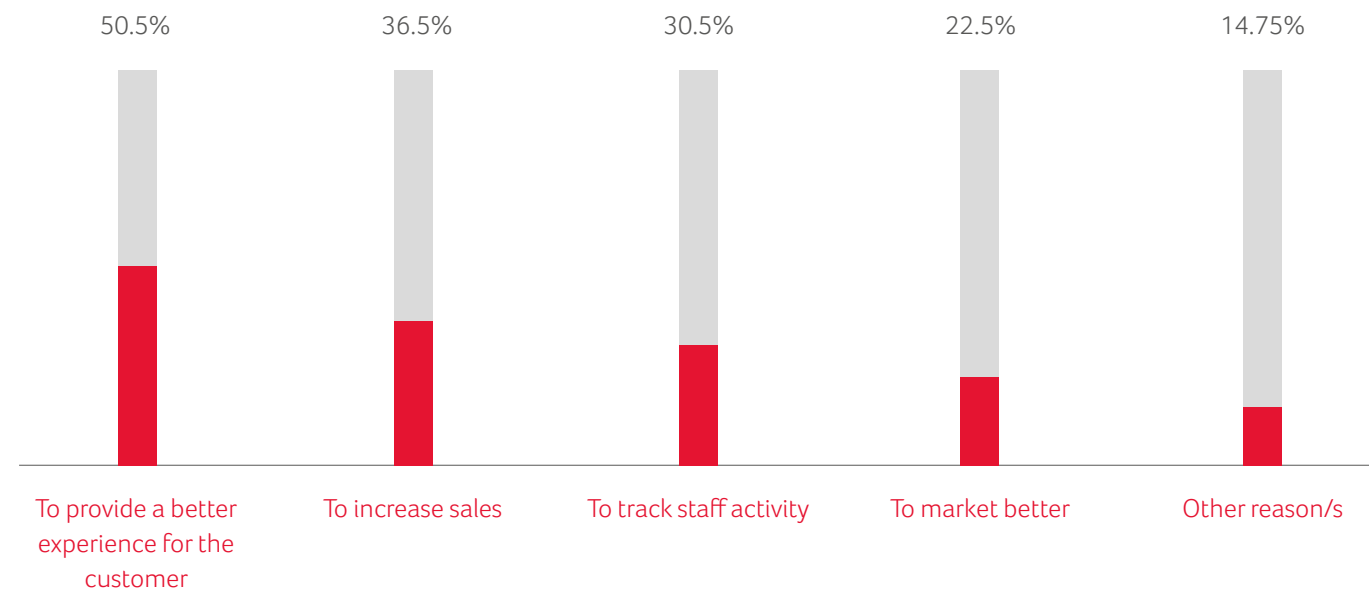
Customer Service Or Lip Service?

We all want our customers to be satisfied with our products/ services, and initial results appear to show that our polled companies agree. But are the headline figures telling the full story?

Would you describe your company as customer-centric?

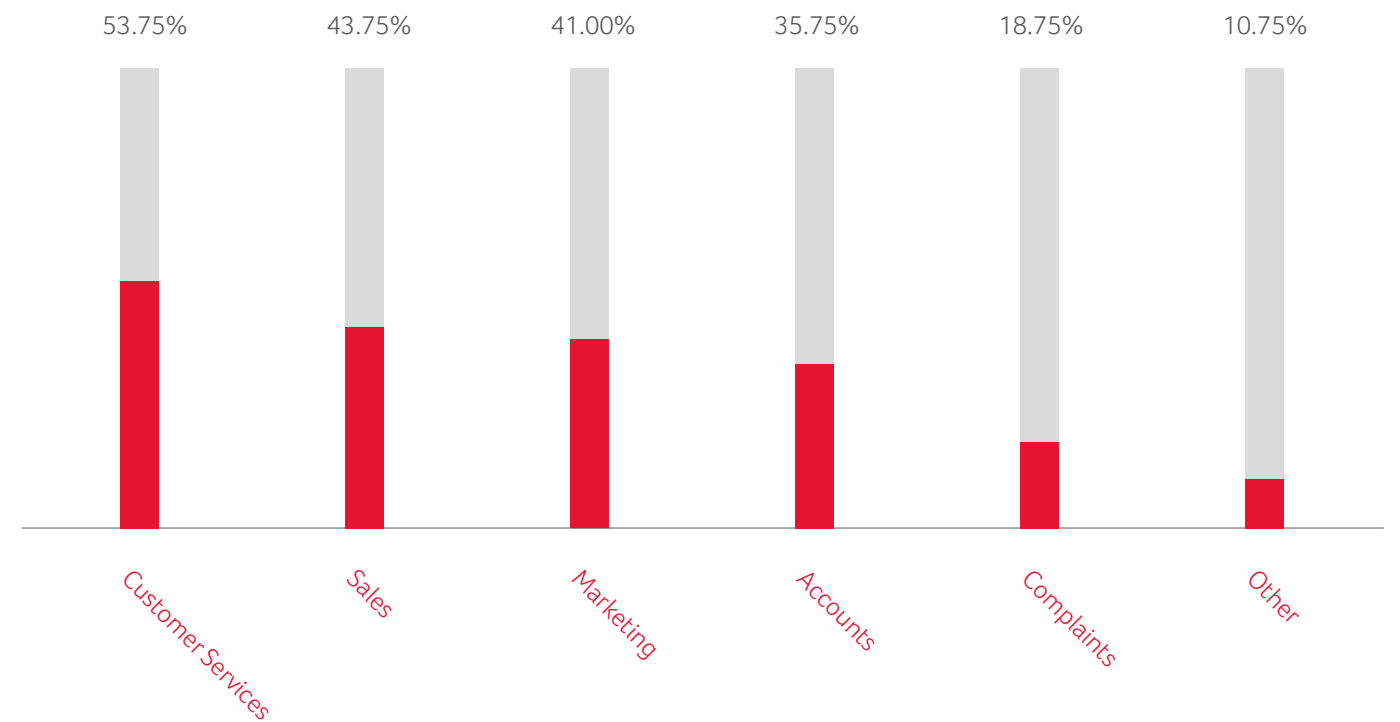


Why was the CRM system implemented in your business?



The results suggest that companies are putting their customers front and centre, but digging deeper into the survey's results reveals that this customer focus may not be as defined as it should be.

Which departments use CRM in your business? Select all that apply.

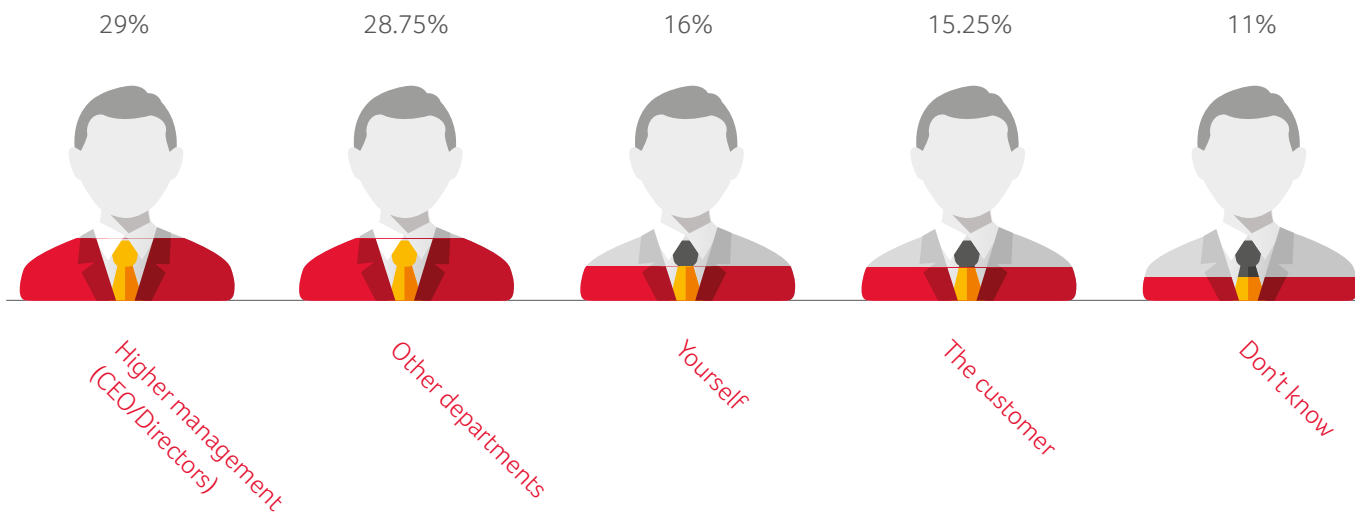


At first glance, it's good news – Customer Services is in pole position. But there's a fly in the ointment as Complaints weighs in at only 18.75%. It's a worrying anomaly; after all, the most critical element of any customer service strategy is not only to ensure a smooth process for customers buying products/services – but to deal with those customers for whom the process has gone wrong.

“CRM offers the perfect platform to monitor complaints and spot issues with your company's operations, plus engage transparently with the upset customers and potentially create a positive outcome from a negative situation. To miss such a golden opportunity in a digital world where consumer word-of-mouth can make or break a company is a serious misstep.”

Billy Lyle, Redspire

Who do you think benefits the most from your CRM system?



In the most telling of all this section's results, respondents don't believe customers are benefiting as much from CRM as the company itself is by a large margin – and in the case of the MDs/CEOs surveyed, none of them rated their CRM as benefitting the customer. While the ultimate goal of any CRM platform is to maximise a company's potential, customers need to be treated with equal importance – to dismiss or ignore them risks alienating your client base in the long term.

“The fact that higher management tops the ‘Benefits’ result above all other employees and departments suggests another potential issue that could damage their CRM strategy; that employees won't see how CRM applies to them and their role. If this attitude is left to fester, it risks departments regarding the CRM platform as a management vanity project or as a costly exercise in keeping up with ‘the Joneses.’”

Billy Lyle, Redspire

Relevant or Irrelevant?

An effective CRM system is all about empowering companies and their employees – but are employees actually finding them relevant to their day-to-day working life or is there still room for improvement?

For businesses who believe that CRM is critical, the relevancy issue is surprising. Management should expect an 7-or-above relevancy rating on their investment.

On a scale of 1-10 (1 being low, 10 being high), how would you rate the relevance of information presented to you in your CRM system?



Average = 5.15

Sales & Marketing Matters

Asking Sales and Marketing Managers to rate relevancy reveals that serious work needs to be done to boost the relevancy to these two company-critical departments. Of the 10 marks available, the largest percentage awarded to an individual mark was:



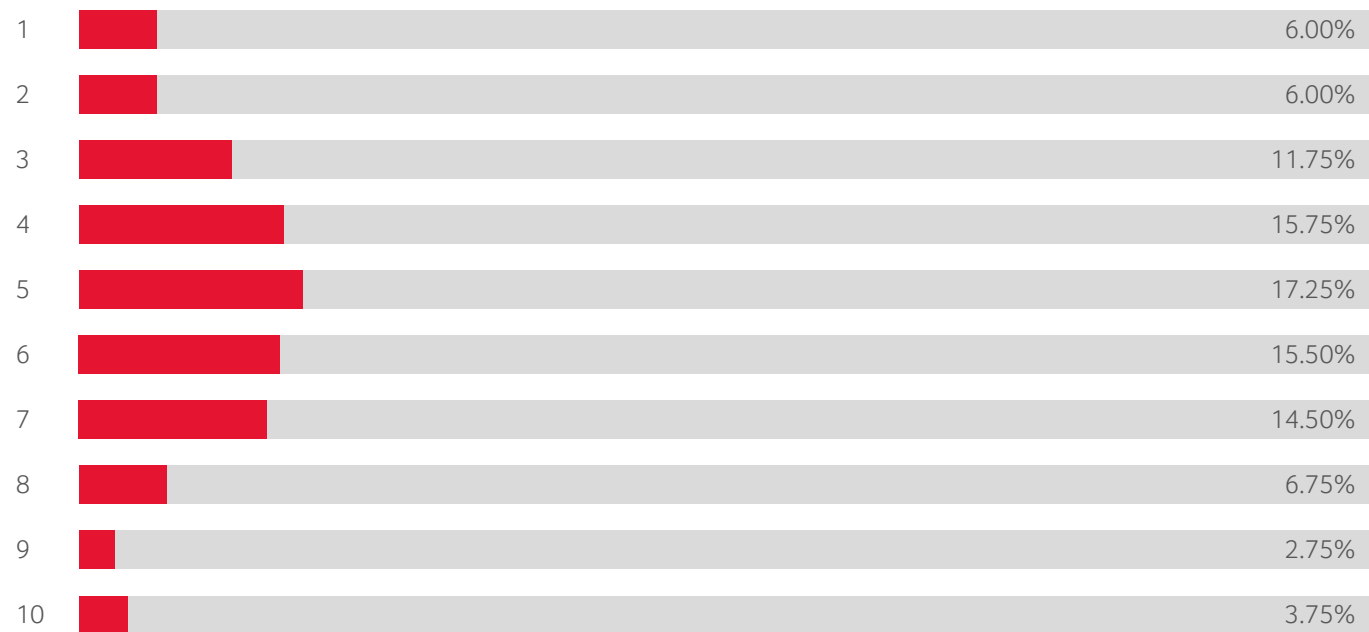
“Again, another troubling result and drilling deeper into the results reveals that there may be trouble at the top too. Of all the employee positions who were asked about improving CRM implementation, it was senior management who were most underwhelmed with their current CRM set-up and selected ‘10’ as their answer. 10% of Marketing Managers, 9% of IT Managers and 14% of Managing Directors want to rip out their existing CRM system and replace it with a new one.”

Billy Lyle, Redspire

Education or Misinformation?

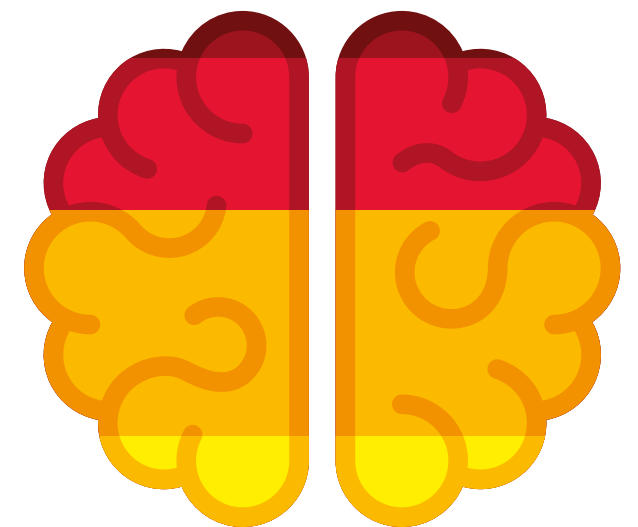
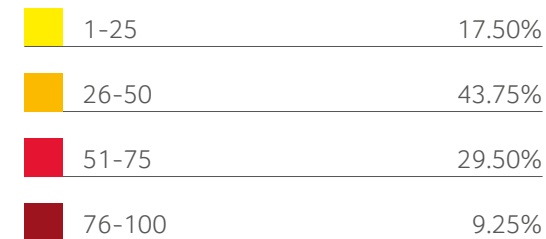
A CRM system can be perfectly optimised – but without the right employee training, its potential can be wasted. But has this proven to be an issue for our respondents?

On a scale of 1-10 (1 being not much, 10 being you need a new one), how much do you feel your CRM implementation could be improved?



Average = 5.13

Roughly what percentage of the CRM system functionality do you think you know/understand?

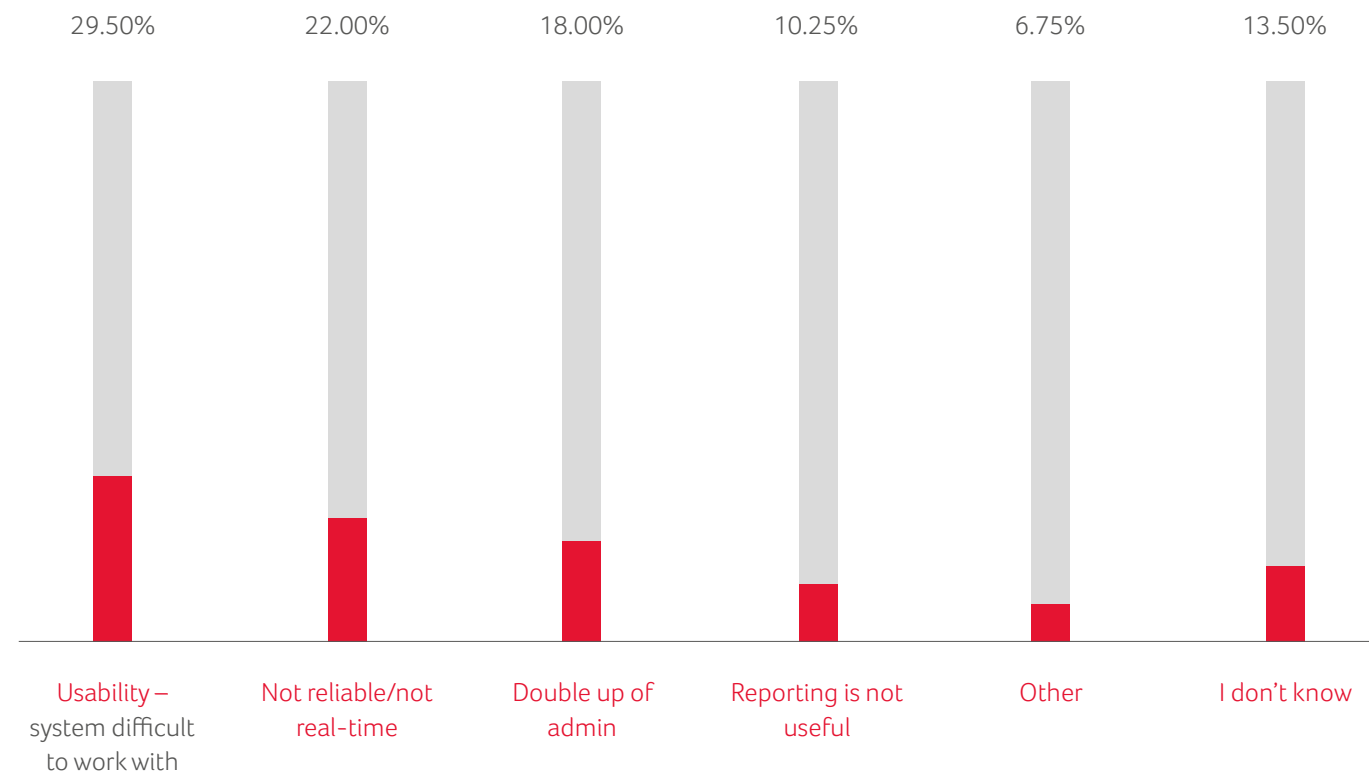


Average = 45.63%

Do you feel you could accomplish your job more efficiently with a better understanding of the CRM system and what it can do for you?



What would you say is the main fault of your current CRM system?



The three results show that the majority of employees require more guidance to make the most on their company's CRM investment; the usability issue in particular is a telling example of the underlying problem. It's an issue that's oft-cited when discussing CRM – that a company doesn't understand the full functionality of its platform and is in urgent need of further training.

Deal with Departments

“To avoid time and potential being wasted, it's critical to take a two-tier approach to training:

Senior management should put training programmes in place to bring each department up to speed and explain fully what CRM can do for them – and critically what it can't do. It's also important that each department has a CRM advocate who can demonstrate why and how the platform can benefit them with real-world success stories.

Deal with CRM

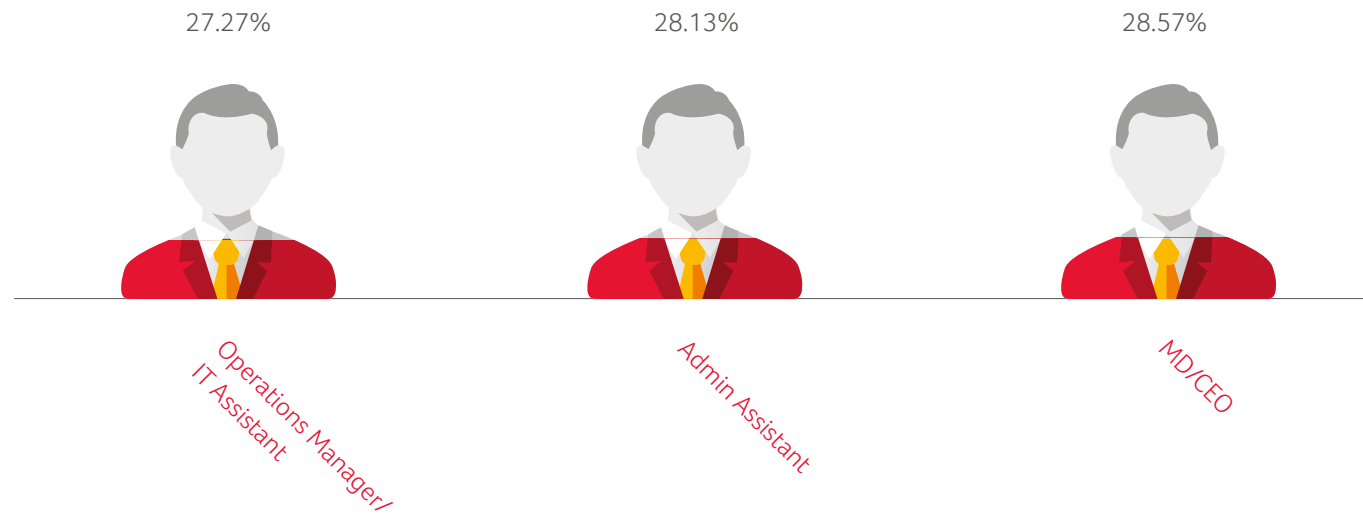
To ensure full CRM optimisation for each department, ask for further training and guidance from your CRM suppliers. If they are unable or unprepared to provide the back-up required, bring a consultant onboard to boost the ROI on your initial CRM investment – or consider changing your CRM platform to a provider who will deliver on its initial sales pitch with clarity and commitment.”

For more information on how to avoid major CRM issues, view this essential Prezi presentation.”

Billy Lyle, Redspire

And Finally – Clueless in the C-Suite?

When asked about their knowledge of CRM functionality, the least three informed job roles were:

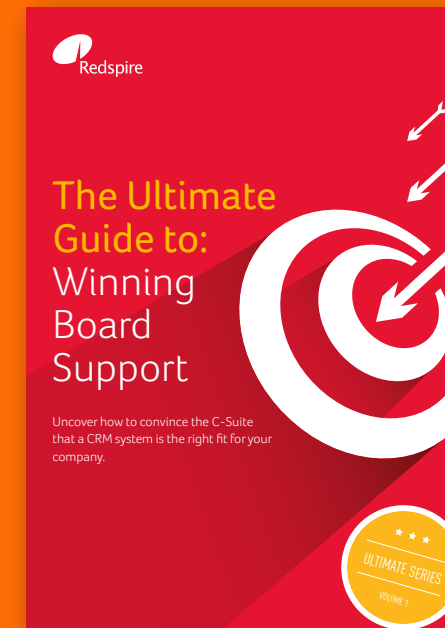


Could this explain why CRM implementations and rollouts can fail so badly? And if the person signing the cheque doesn't understand what the platform does, what kind of message is that sending out to sceptical employees?

Takeaways

To ensure your CRM is working for you:

- Ask employees for feedback about the platform; are they experiencing issues? Do they feel there is room for improvement?
- Offer further training and guidance if you feel it is required.
- Talk to your CRM provider about any problems and how they can be resolved.
- Bring in a consultant to troubleshoot your CRM issues if your provider is unable or unwilling to offer guidance.
- Monitor your CRM on a frequent basis to ensure your investment is not wasted.
- Put your customer first; it was the main reason why you implemented your CRM in the first place.



Download our free eGuide to ensuring the C-Suite is fully behind your CRM plans before its rollout:

The ultimate guide to: winning board support

[Learn more](#)