10 ways...

to maximise the potential of your CRM solution

A practical guide by Richard Jenkinson

We should all be singing the praises of our CRM system, marvelling at how easy it makes our working life, how simple it is to use and how great it is at enabling us all to measure what is happening in our organisation. Yet, all too often a CRM system adds another level of complexity and reporting to the lives of employees.

Instead of being a tool that enables sales teams to maximise efficiency, it can become cumbersome and inhibit good business processes, being used as a reporting system rather than a business tool. However, if designed to work specifically for a business to mirror its business processes and if implemented correctly, CRM can become the life-blood of any organisation, helping companies identify where they should be directing their resources and why.

CRM can be the most powerful tool a business can use. In 10 simple steps companies can turn CRM from a boring must-have, into the core of a thriving and successful business.
1. PERSONALISE YOUR CRM

The first and most important rule for CRM is that CRM systems must be personalised to fit your company. Any system installed today must be able to reflect each individual company’s processes – for each individual user. Put simply, if a CRM system does not have the flexibility to mirror the way your business works, then it will never be used effectively, nor will it provide you with the business intelligence you need to make sales and retain clients.

This perhaps is the most important issue to tackle when making CRM more effective for your business. And it is particularly true in the pharmaceutical industry where the sales process can be more complex and varied than in other industries.

The need to target multiple decision makers across a number of organisations, the need to manage various customer types and the need to co-ordinate your sales and marketing activities on individual customers are just a few of the specific issues facing this business sector.

Today’s web-based technology means that CRM solutions can, and are, being designed to enable a full match to a company’s business processes rather than the historical “standard practice” of changing the company’s processes to match those within the rigid CRM application or, more simply, excluding any complex processes from the CRM system!

2. MAKE THE CRM AVAILABLE TO EVERYONE

It is vital that your CRM system can be used enterprise-wide. Often CRM is seen as a sales tool, with access restricted to sales reps and their managers. If access is given to all customer-facing staff, such as marketing and medical departments, administration staff, order processing, customer care centres, etc, then true collaborative work can take place.

Giving access to the CRM system to a broader range of staff leads to obvious efficiencies in sharing information, but much more fundamentally helps to build a more customer-centric organisation and leads to a more cohesive sales and marketing approach.

Today’s advanced technology ensures that while everyone is working on the same application, each user has the specific information needed to ensure that they only access information that is relevant to them.

3. IMPROVE THE CRM EXPERIENCE

The most fundamental part to a successful technology installation is the user experience. Unless a CRM solution provides a great user experience, as well as providing each user with individual business benefits, then the system is unlikely to gain employee buy-in and be used effectively throughout the organisation.

Additionally, companies should not expect staff to spend weeks learning – or more accurately remembering how to use a CRM system. This simply isn’t realistic in today’s business environment: time spent on IT training eats into customer-facing time. Nowadays, the vast majority of employees are familiar with using many types of web applications in their daily lives, from online supermarket shopping to booking vacations. Giving employees a CRM system that takes into account an internet browsing ability combined with knowledge of its employees will lead to a more familiar and better experience than traditional CRM offline applications.

More and more companies are embracing this technology change in various parts of their organisation, such as HR and expense reporting. CRM is following this trend.

4. ENSURE THAT CRM MEANS ONE CUSTOMER VIEW COMPANY-WIDE

Using an internet-based CRM solution provides uniformity of data company-wide. Once information is updated, it is shared instantly with all those who have access to it, providing a uniform picture of what is happening across the whole business. This enables all reports to be fully updated at any time and allows decision-making to be made with the most up-to-date data.

Older, offline CRM systems rely on employees updating their information and then having to upload it to a head office server. This creates a permanently disconnected environment and leads to some decisions being taken without access to the latest information.

A comprehensive view of the customer is critical in today’s environment and, with so many “touch points” for any organisation...
with its customer base, to neglect any piece of this complex mosaic undoubtedly places an organisation at a competitive disadvantage.

5. **INVITE YOUR PARTNERS TO JOIN YOUR CRM**

Imagine if your CRM application could allow you to communicate directly with your clients, distributors and partners? Think about them being given access to certain parts of your CRM solution: consider the efficiencies this would bring.

Take home delivery products as an example: give your distributor access to the web-based application that informs him which deliveries should be made and get him to update the status as it passes through his organisation to delivery and finally to the patient - enabling your company to see what is going on, giving you a better chance to ensure that patients are satisfied.

This is all possible with some of the more advanced CRM systems available. It is also important to remember that while technology allows for IT solutions to be open to a number of organisations over the internet, it still ensures that critical data is kept securely.

6. **MOVE CRM FROM INFORMATION TO INTELLIGENCE**

It is critical that your CRM system works with your organisation’s key performance indicators (KPIs) and produces meaningful reports and analyses instantly. Companies that have solutions that produce monthly KPI versus target reports distributed via round robin spreadsheets are at a competitive disadvantage to those that have KPI indicators on their home dashboard, enabling corrective actions to be made within the month, not 15 days after it.

Of course, the KPIs need to be “drillable”, enabling the user to identify exactly where it is in his organisation or territory that the problem lies. The fact is, if you can’t measure, you can’t manage. Companies need to give employees the best chance of effectively managing their areas of responsibility. To do this, they need to give them real-time performance measures.

A CRM system that provides intelligence and insight to help users is a critical business tool that help companies implement, drive and adapt strategies. Those systems that do not will remain, at best, as control-driven management tools.

7. **GET BEST VALUE OUT OF YOUR CRM**

Financially, a new CRM system is a huge commitment, but what happens if your business dramatically changes only a matter of months after implementation?

Traditionally, CRM systems have been bought via licences at a fixed cost for a number of years, usually with high upfront charges to install the system. Should the number of sales staff change within your organisation you might not be in the best position to react to this. For example, if an organisation withdraws from a therapeutic area and the number of reps decreases, you could end up with unused, but paid for, software licences, so called “shelfware”.

Over the past few years, there has been a huge rise in demand for on-demand software or Software as a Service (SAAS). Put quite simply, companies pay for what they use. There are no major upfront costs, like those required to install proprietary, legacy systems. Instead, companies are billed on a variable basis. This works out as a cheaper and more flexible method of paying for technology.

8. **MAKE SURE YOUR CRM IS ADAPTABLE**

Similarly, could your CRM system cope if your business model changed after installation? Sales models evolve over the course of the years and if your business introduced a new sales model would your CRM system be able to handle this?

In some markets doctors are less and less influential in making decisions on what they are able to prescribe; instead a whole host of other influencers need to be included in the sales process. Most new internet-based CRM systems will allow you to make these changes to the

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system almost instantly, but what damage would it do to your business if your CRM could not keep up with the direction your business is going?

In most European countries, the change in the buying model over the last five years has required a new strategic approach to selling. In the majority of cases, this new approach has not been implemented within legacy CRM systems.

Those companies that have implemented bespoke strategic selling (or key account management) processes and methodologies within their CRM system are now reaping the rewards in sales.

The ability to incorporate and add in sales reporting functionality and analysis is a vital step in moving from historical Electronic Territory Management Systems (ETMS) to a fully integrated CRM system. Managing and recording activities is a good first step but in today’s environment organisations need to view the complete picture in order to measure the commercial return on those activities.

Similarly, make sure that the technology your CRM system uses is the most up-to-date and can be developed over time. Systems that rely on up-to-date web technologies have the best chance of standing the test of time and being adapted as technology develops.

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**9. ENCOMPASS CRM OVER ALL GEOGRAPHIES**

CRM needs to be capable of supporting European and worldwide sales and the respective marketing strategies. While each market can be very different in the way pharmaceutical business is conducted, corporate management needs to be able to look at data across all regions and identify best practice, as well as be able to compare data country-by-country.

A good CRM system, therefore, should allow for the nuances of regulation and business culture in different countries and regions across the world, yet provide senior management with consistent business information and support across the organisation.

The ability to compare and contrast performance from consistent and reliable data sets cannot be overestimated and is the core of all well-managed efficiency and effectiveness programmes.

**10. MAKE SURE YOUR CRM HAS A FAN-BASE**

However good a CRM system is, it will never work without buy-in from staff at all levels. If managers do not recommend the system to their teams then it will not be effective. Senior managers need to support the CRM system, use it on a regular basis and reap the benefits from a business enabler rather than a management tool.

Users need to have a system that is easy, clear and simple to use, and adds value to their daily work, these are the main advantages of web-based CRM systems. These 10 ways will ensure that CRM becomes the life-blood of your organisation.

**Author**

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