

Ten Golden Rules for CRM

1 Keep your information in the right place.

If it's a new customer then start a **customer record**.

If it's a new opportunity with a customer then start an **opportunity** and track your activity against that opportunity.

If it's an agreed business project then start a **project**.

Tip: If you are successful with the opportunity and close it as 'won' then it will be converted into a project automatically.

If you don't record your information in the right place then your reporting and market categorisation will be a nightmare.

2 Know the difference between a lead and a contact.

If you've met someone at a conference and want to keep their contact details – that's a **lead**.

If you know we are going to do business with them and want to start an opportunity – that's a **contact**.

You can always convert a lead to a contact later.

You don't want to clutter up your reporting with records of people with whom we're not doing business.

3 Make sure your links and attachments are real.

Documents, pictures and other files should be attached to the opportunity or project.

Alternatively, you can create a link to a network drive that will be accessible to other people.

Not your H: drive, not the super-secure folder on your departmental M: drive, not your PC, not a memory stick etc.

4 Filters are very, very cool.

Use filters to reduce the enormous amount of information in the CRM to something that is useful to you. For instance, if you want to see all the contacts in Birmingham then filter on Birmingham in the 'City' field – essentially, you can filter on any column.

Here's how to do it: go into a list view, and click the grid icon "*See the records associated with this view*". Click on the filter icon (funnel shaped icon). Down-arrows appear by each column. Click the down-arrow on the city column, choose '*equals*', and type "Birmingham".

Click OK. The list now contains all the records in Birmingham.

Remember, you can filter on any column.

5 **Wildcard Searches are probably even cooler**

You can search records for words, names, numbers or even parts of words, names or numbers.

Say you want to find records that have in them the words 'industry' or 'industrial'. In the search box (magnifying glass icon) type *industr and hit enter. You will get all the records with 'industry' or 'industrial'. Get good at this and it will save you a lot of time.

6 **Use charts to visualise data**

Using charts to visualise data in list views can make your life a lot easier.

For instance, click on a list view such as 'Accounts'. Click where it says "Click here to view charts" (bar chart icon). Click on the dropdown called "View accounts by owner". You will get a chart showing you how many accounts each user has. This is so much easier than viewing them in a list. Click on any white space in the chart and the list comes back.

Charts work the same way in the CRM Outlook client as well.

7 **Bulk Edit = huge time saver**

Use Bulk Edit when you want to edit one particular field on multiple records.

Here's how: In a 'list view' select multiple records – you will see a tick mark by each record you have selected. Click on 'Edit' in the ribbon. What you type in the dialog box will update that field in every record you have selected. It's a great feature - but be careful.

8 **Cut the confusion – use Recently Viewed Items**

When you start working with multiple records (and you will) a LOT of tabs are going to be opening. Click 'Recently Viewed Items' (Clock icon next to the Search box) and you will get a list of just the tabs you are working on.

9 **Pins are like bookmarks**

If you have accounts you are working on all the time click the pin icon next to them in the 'Recently Viewed Items' list. They will stay stuck to the 'Recently Viewed Items' list until you untick them. Now, wherever you are in the system, you can get back to the account with a single click.

10 **Use CRM to help plan your work**

For instance, say you want to follow up an opportunity with a phone call in 3 months' time. Create a phone call activity with that due date. The activity will be listed in your dashboard. In three months you can make the call, mark the activity as complete and record the outcome. In this way you will be able to see your outstanding workload; you will have reminders for forthcoming activities and not have to create records in CRM retrospectively.

11 **Try not to use acronyms only your department understands.**

OK, that should read: **Eleven Golden Rules for Customer Relationship Management**. Not 'Eleven Golden Rules for CRM'. Do this and it will save you hours of phone time having to explain to people reading your records what your acronyms mean.