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12 Days of CRM: Day 1 – How to Measure CRM Success

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On the first day of CRM, Chris “Kringle” Fritsch explained to me, how to measure CRM success!

CRM success is different for every firm. If you have a CRM system, success can and should be measured. Figuring out which metrics to use to measure success is subjective.

There are metrics everyone can use to measure success, including web analytics, email deliverability, and tracking, which tell you the health of your list data and how well you are reaching your audience.

But there are other metrics that can be used to measure CRM success that most firms don’t think about, like tracking business development activities, the number of users going into the system and pulling information from it, or tracking the lifecycle stages of a prospect from the initial conversation until the proposal is sent out.

These are all great success metrics for firms that already have a CRM system in place, but what about organizations that are just starting a CRM project and aren’t able to report on these metrics?

Tracking success in the early stages of a CRM initiative can be difficult but it is achievable. The first step should be to define a set of achievable proxies that can be used to communicate success. These may be small steps of progress as you approach a departmental roll-out, or achieve the support of various departmental leaders.

Defining success isn’t easy and involves a lot of time and attention, Chris Fritsch of CLIENTSFirst Consulting explains different ways firms or organizations can define success, whether they already have a CRM or are just starting an initiative.

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