

# Is It Time for Your CRM System to Evolve?

*Like nature, technology is always moving forward and adapting —and your enterprise applications should be no different.*

By Imad Al-Abed - Posted Jul 7, 2016

---

Did you know that birds and crocodiles are close relatives? They share a common ancestor that lived about 240 million years ago, one that gave rise to the dinosaur. So what happened? Evolution. Birds adapted and changed dramatically, while the crocodile has barely progressed. If your users had to choose which animal best describes your Customer Relationship Management, what would the answer be?

Organizations have come to view CRM systems as an integral part of their enterprise application network. Top CRM objectives include a desire to obtain a 360-degree customer view, improve collaboration and efficiency, and derive actionable insights from the data that has been collected; however, the success of CRM systems is fully dependent on the users. Traditional enterprise applications have concentrated on functionality, with limited regard for the needs of the end user. The proliferation of user-friendly consumer applications and web sites are forcing CRM systems to rapidly evolve. Users are demanding intuitive navigation, rich analytics, and a robust mobile experience.

## **USER INTERACTION**

Traditional CRM systems can be disorienting, which leads to an initial resistance in adopting the system. Worse yet, an underused or poorly used system will not generate the anticipated results; in other words, “garbage in, garbage out.” CRM adoption starts with intuitive navigation, and it is essential to a user-friendly system. By adopting a consumer-grade interface, you can reduce the learning curve for new or reluctant operators and improve productivity—less time training, more time using.

CRM systems also need to be integrated with other productivity tools to allow users to send emails, schedule appointments, and collaborate with the least amount of clicking. One study found that employees switching between applications suffer a drop in productivity by as much as 40 percent, so it’s important to focus on the simplification of the user interaction in order to increase the engagement. A comprehensive dashboard that presents aggregated information and actions necessary for given tasks, while allowing for further navigation to details, will keep users on point and focused.

Systems also need to cater to a wide range of user styles. Modern users want to be immediately engaged; however, different levels of engagement are expected based on the needs of the user. Superusers require powerful tools to speed up repetitive tasks, while beginner users might request a more streamlined experience. Interactive visuals and dashboards will allow users to more quickly identify and act upon opportunities; in addition, strong personalization capabilities create a system that each user can feel is “built for them.”

## **ANALYTICS CAPABILITY**

CRM systems are expected to be data rich, dynamic, and easy to use. They need to offer more than simply collecting and organizing data. While data is comprised of raw facts and figures; information is data with a purpose. That purpose is the actionable insight that enables the user to better anticipate the needs of their customers. For example, the customer demand for a certain product can be forecasted based on their history and/or their behavior; experienced relationship managers can predict the next product a customer is likely to need and purchase based on similar customers.

To provide the level of information necessary, data must be relevant and accessible from a variety of sources. An organization will need the ability to collect, analyze, and present data transparently from various systems, channels, and sources in a meaningful way. Integrated systems only improve the user experience by providing additional data to be incorporated into the framework of knowledge. For example, sales and marketing must work together to determine lead qualification criteria and processes. CRM applications with both marketing and sales modules can prove very useful in automating this process, ensuring the right leads are delivered to the right salesperson at the right time according to predefined criteria. Because the CRM system is also a central repository of prospect information, sales agents can tailor these action plans to individual prospects based on demographics and preferences. All of this adds up to smarter, more

strategic, value-based selling, and ultimately to higher sales conversions.

## MOBILE EXPERIENCE

Mobile devices play a critical part of U.S. consumers' daily lives. Mobile access is becoming the preferred way to interact with an application, even when the option is available via desktop or laptop. Mobile options will not only increase efficiency, but can also facilitate faster, more informed decision-making [regardless of location](#). Enterprise applications are expected to have similar accessibility without sacrificing functionality. Every inch of the screen needs to be carefully considered with an eye towards minimizing thumb taps and a drive to seamlessly blend the desktop and mobile experiences. A responsive design ensures information is rendered appropriately for different mobile and desktop devices.

Users want to be able to access and update data while the information is still fresh. According to a [survey](#) of mobile CRM users, 82 percent said accessing the system on a mobile device improved the quality of their data. With a well-designed mobile app, you will be sure to keep your CRM systems current with increased user adoption.

As Charles Darwin stated in *On the Origin of Species*, "It is not the most intellectual of the species that survives; it is not the strongest that survives, but the one that is best able to adapt and adjust to the changing environment." The right CRM solution can support and even advance an organization's ability to adapt to changes as they occur. Users are demanding a better experience, and organizations will reap the benefits from that with greater adoption and a much more effective and accurate business system. Without full participation and adoption from users, CRM initiatives often fall by the wayside, and all that is left is an ineffective and costly rolodex.

---

*Imad Al-Abed is Onyx product leader at Aptean and has more than 15 years of experience in the CRM space. Al-Abed started his career as CRM technical consultant and spent more than 10 years implementing and integrating CRM solutions for numerous clients across a variety of industries. During the past five years, Al-Abed has shifted his focus to CRM product management and is responsible for evolving CRM to ensure that client's needs are met. Al-Abed holds a bachelor's degree in electrical engineering from Boston University and has a master's degree (MSc) in management information systems from Concordia University (Montreal, Canada).*