Unlock business potential

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With new structures and better data quality

Spring brings new life to everything, it sprinkles the magic of a new beginning, transformation and growth and invites us to a big clean-up. With new energy and a fresh tailwind, it's now the ideal time not only to dust off your home, but also to free your business environment and IT landscape. Storage of unnecessary and obsolete data, outdated documents or useless functions and inefficient processes inhibit productivity, impede relationship management and disrupt efficient working. This is why it's important to pay regular attention to 'data and CRM hygiene', as we all know that a well-maintained CRM is a must for successful customer service.

Let's swing the digital broom and take the following 5 steps together.

Review and requirements analysis

Step 1

Before you go straight to the clean-up and start with the (data) cleansing and updating, a review and requirements analysis is necessary. Today, companies can collect and access to more data than ever before, but not all of it is really useful. Before you start cleaning up data and files, you'd better check which types of information are relevant for your company and which processes may need to be optimised.

Recommendations

- Take a holistic view of your processes and the required data and scrutinize the following:

  - **Relevance:** What data is actually relevant for your company to design processes efficiently, to inspire your customers with the best service and to help you make the right decisions? For example, do you still need fax numbers?

  - **Completeness & consistency:** Is all the necessary information stored in your database? And does data from different systems match?

  - **Comprehensibility:** Is your data clearly interpretable?

  - **Degree of digitalization:** Is all the required data and information available digitally or are you still using paper documents?

  - **Retention period:** Has the expiry date of addresses already passed? According to the GDPR, there are guidelines that clearly describe data retention. Define a storage period, e.g. based on the legitimate interest.

  - **Protection:** Which data accesses are necessary and do your users have the appropriate user rights to view data?

- Identify data sources, recognize data quality problems and prioritize the data to be processed.

- Take a look at filters, functionalities, dashboards and interfaces and ask yourself whether they fully meet your company's needs or whether they require optimization.

- Evaluate the relevance and quality of the available reports and dashboards.

- Involve your employees to improve the effectiveness of processes, dashboards and the user-friendliness of your CRM solution, because they know the individual requirements and performance best.

- Review your measures to comply with the GDPR standards and check your security guidelines to protect yourself against cyber attacks. Please see also the recommendations on our cyber security website.

CRM implementation tip

- Assess your level of digitalization: With just a few clicks, you can determine the CRM maturity level in your company and discover new strategic development potential: CRM maturity wheel with the digital check.

Updating and cleansing of data

Step 2

A CRM system should help to manage your customer data efficiently and provide a 360°-view of the customer. Therefore: well-maintained data instead of digital 'dead bodies'. Unusable data inhibits the performance of your CRM solution and can lead to incorrect decisions that could have a negative impact on relationships with your customers and prospects.

Recommendations

- Remove unnecessary data as a team because working together is faster and more fun:

    - Merge duplicates.

    - Correct typos or incorrect contact information.

    - Complete incomplete data.

- Delete outdated information; this includes, for example, addresses that you have not been in contact with for years.

- Empty your digital recycling bin.

- Clear out your e-mail inbox.

- Implement a clearly defined data erasure concept and introduce an automated workflow for regular data dust removal.

- Document processes and provide assistance for data entry, ideally directly in the CRM.

☼ CRM implementation tips

- To keep cleaning costs low, you should avoid errors right from the start: In the video tutorial Improving data quality quickly simple and fast, we show you how you can easily create, actively check and efficiently maintain correct addresses with CAS CRM.

- Predefined dashboards and checklists are helpful for successful data maintenance in order to clean up incorrect data quickly. We'll show you how our CRM +AIA® solutions make it easy for you to design automation and notification services for better data quality: Date maintenance made easy: Address and data quality.

Process optimization

Step 3

Tidying up is not only good for removing data dust, but also for clearing out unnecessary and unsuitable processes. After all, customer needs and market requirements are subject to constant change, just like your company, which is constantly evolving and growing. It is therefore necessary to continuously scrutinize processes, modernize them if necessary or simply abolish them completely.

Recommendations

- Check your processes:

  - **Consistency:** Are there integration gaps or data silos that interrupt workflows and harm productivity?

  - **Obsolescence:** Do the processes support employees in their work or are they more of a hindrance and offer little added value?

  - **Optimization potential:** Which processes are outdated and no longer necessary?

  - **Automation options:** Are all relevant processes fully automated or are there areas that can be automated to avoid manual input and keep the error rate low?

- **Back-up process:** Create back-ups of your relevant data to ensure data availability in the case of an emergency.

�💡 CRM implementation tips

- Your employees are the experts – establish a digital improvement process in CRM to record your ideas and suggestions for optimization and pass them on to CRM management for evaluation and implementation: Digital CIP - Continuous Improvement Process.

- Connect Microsoft Outlook with your CAS CRM solution: Use the Outlook Add-In and access important CRM data directly in Outlook. Our video tutorial will show you how to successfully integrate it: CAS CRM Outlook Integration.

Tools and technology

Step 4

What applies to data and processes also applies to tools and technologies. CRM systems are often all-rounders with the special ability to exchange data seamlessly with a wide range of IT solutions. Take advantage of this potential and create an integrated system landscape that perfectly suits to your company and its needs.

Recommendations

- Examine interfaces, functionalities, software and apps that are used in your company.

  - Which ones are no longer up-to-date and need an update?

  - Which ones should be launched or added in order to work more efficiently?

- Check whether your software is up to date and run software updates if necessary in order to take advantage of the latest technology and minimize any security risks.

- Make extensive use of digital freedom: Are your tools and technologies available as web or app versions?

- Do your employees have the necessary licenses for the software solutions they need for their work?

- Keep up to date with CRM trends, tools and technologies to continuously improve your CRM and discover new market potentials.

- Ensure that all important (customer) information is recorded and stored in a central system and dissolve data islands on individual computers. This is particularly important with regard to data protection and security.

💡 CRM implementation tips

- Work wherever you want: With CAS CRM Web or the Mobile App, you can use your CRM on the go no matter where you are and provide the best possible service at all times – both online and offline. In the video tutorial, we show you how to Access Your CRM Data Offline.

- Are you already using your CRM solution from CAS Software AG with the look and feel of the unique SmartDesign® technology? Whether web or mobile app, a cross-platform design on all devices promotes efficient working from anywhere and increases acceptance among employees.

- Unleash the full potential of CAS CRM and enjoy the full power for smooth workflows and the hybrid workplace thanks to numerous networking options for your business tools: CRM interfaces and extensions.

- Subscribe to the FAQ newsletters from your providers and our CRM news and motivate your employees to do the same.

Culture and Mindset
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Step 5

A strategy rises and falls with people, without them no plan can be implemented. Therefore, create a data quality mindset right from the start and make the benefits for sustainable success and efficient collaboration clear and tangible throughout the whole company. Bear in mind that professional data quality and CRM optimization management requires time and space for implementation.

Recommendations

- Institutionalize the data optimization process by conducting regular tidying and cleaning activities – not only in spring, but also, for example, through a monthly data maintenance day or quarterly process day. By the way: Do you know that there is a Digital Clean-up Day every third Saturday in March?

- Define and document data quality targets and metrics. Make these transparent within the company; this will help new employees in particular with data maintenance. And create an ambitious but realistic timetable for implementation.

- Appoint qualified CRM managers and establish data quality and CRM optimization routines to continuously digitalize processes and further develop your CRM so that it grows optimally with your company.

- Train your employees in data quality management and also train them in data analysis so that they can recognize, interpret all the important information from the data. Tip: Make the knowledge accessible and ensure a transparent transfer of know-how within your organization, e.g. via a learning platform.

- Strengthen the mindset of each individual employee with regard to data quality and its potential for your company by offering workshops and training courses or by stirring enthusiasm for data maintenance, for example, by crowning a 'data champion' of the week.

- A trained eye from the outside can help tremendously: Ask your CRM partner for support and organize a coaching session to analyse your data and processes and develop measures out of this. Having an objective expert take a quick look can open up new perspectives on procedures and processes.

💡 CRM implementation tips

- We provide our customers with valuable and practical CRM know-how on our digital learning platform. This enables all CRM users to deepen their skills through self-study and make their daily business more efficient: CAS TrainingCenter | SmartWe TrainingCenter.

- **Ideas app:** Offer your employees a platform to submit their suggestions for optimization at any time. With the ideas app for CAS genesisWorld and SmartWe, your employees can record ideas effortlessly, in a structured and rapid manner and share them with the company.

Digital clean-up visualizes potential
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Conclusion

Cleaning up is not just a necessary technical measure, but a valuable investment in the future of your company. Because it is far more than a one-off 'tidy-up', it is much more the key to greater efficiency, inspiring customer service and sustainable success.

Your data doesn't have to be perfect, instead it has to meet the requirements for which it is to be used. After all, it is almost impossible to have 100 percent correct data at all times. But by regularly maintaining and optimizing your data, processes and technologies, you are always optimally trained and efficient. You create a solid data basis, an ideal working environment and always ensure suitable tools for your employees while staying up to date on growth potential for your business.

With a well-maintained CRM, you can increase sales performance, identify customer needs

faster and more precisely and improve your agility in response towards market developments. Continuous investment in data analysis, CRM optimization and IT improvements pays off: You not only make your company fit for the moment, but also keep your business on the move and strengthen your resilience in order to be sustainably successful and grow continuously.

CRM implementation tips from our expert Niklas Koch

In his previous role as a consultant at CAS Software, our expert has carried out numerous successful CRM implementation projects. Thanks to his extensive experience, he knows the decisive factors for implementing efficient structures and ensuring the highest data quality. Today, as Managing Director for 'Projects for Standard and Industry Solutions', he brings this valuable know-how to his management activities and many new CRM projects.

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