



Your CRM is Not the Answer

Develop your external process before investing in technology to monitor it

by Richard Higby, PhD

Out of frustration, I extolled my business developer to “JUST PICK UP THE PHONE AND CALL SOMEONE!” I was suffering from acute do-something-itis and I was prepared to impale my business developer on the spear of my frustration. The year was 1996, and as National Sales Director, I was charged with growth. By mid-year our net new business was offset by our lost business and growth was zero. My frustration was the result of listening to the 101 reasons (excuses) for not reaching out. What I was failing to appreciate was my own ignorance (arrogance) getting in the way of the team.

As with many technically oriented firms, we were in love with our internal system. That is, the system by which management rolls up the business development prospects and probable opportunities to create a forecast. We had invested in a state-of-the-art Customer Relationship Management (CRM) system, given our team the hardware, training and expectations for using the platform, and were prepared to watch the activity and marshal resources against the BIG OPPORTUNITIES appearing on our dashboard. We waited. We waited. We waited some more. Imagine the constant tone of the flatlined heart monitor, with the attending personnel standing still and watching for it to change, while the patient proceeded into the next life. It was time to recognize the problem was me. What I was failing to appreciate was my team had an internal process, dictated by the CRM and mandated by management, but did not individually have and own an external process – the customer contact process they would individually use to develop business. More importantly, they did not uniformly own their role as business developers and, as a result, did not have the thinking and skills development mindset, never mind the tools, to be successful.

Business development is, afterall, a face-to-face people application with business discussions conducted between individuals. Whether your team was acquired, inherited or recruited by you, they will have knowledge of their market and an understanding of how your offering applies to the market; isn't that why they are on your team? Because of their backgrounds, they will default to sharing what they know with anyone who will listen. They will start, continue, and conclude conversations with their background and “expertise” in the field. They will confuse purpose (meeting the prospect's need) with goal (meeting their requirements). You will observe lots of activity in the CRM but few qualified opportunities. When you build your Business Development structure, you should start with the people, not the technology. It is the people, well-trained and developed in their skills, who will deliver qualified opportunities. This is well understood by small business reliant upon the founder, or a select few, or even one, with native skills in business development (unconscious competency). It becomes challenging to scale with the uneven distribution of skills and diversity of talent inherent in larger teams.

Skills in business development can be taught if the individual has the passion to learn and apply the lessons. We must first select the palate upon which to impart the skills. There are many ways to recruit, interview, and/or assess people for organizational role fit. As the team builds, we must have them align to a customer-facing, customer-centric,



business development process. This is a multi-phase Client Engagement Process (CEP) built upon a disciplined approach of homework, preparation, execution, evaluation, and next steps (the cycle repeats). Your business's CEP will necessarily describe what is involved in each phase to set your team for success. You will build consensus on your team of the value of the external process and use the CEP as a tool that encourages use of the CRM, rather than the other way around. Only after you have invested in your people should you begin to court technology to enhance your internal process and forecast your business.

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