Navigating a CRM Transition

Once you have chosen the best CRM for your Advisory Practice, it's time to make the transition. There are really two different scenarios here:

- Those adopting a CRM for the first time
- Those moving from one CRM to another

First Time CRM Users

For those adopting a CRM for the first time, the good news is you don't have to worry about data conversion and field compatibility – you have a completely blank slate. The bad news is – you have a completely blank slate. You will need to have a list of action items and someone leading the CRM Integration to make sure you are seeing good solid progress. The CRM Coordinator should also provide manageable sessions of key training to the team as part of the CRM integration process. It is much easier for most of us to learn new things when someone simply shows us how it is done.

We recommend you begin by getting all the basic information set up for each of your top clients first, this is sometimes referred to as the 'headstone' or 'basic contact' information. From here, add their detailed information and get their service model set up and automated. Once that's complete, work on your next tier of clients and so on. Another option is to simply get all the basic information in for *all* your clients. From there, and working from the top, begin adding detail and service model automation. Either way, it's really a matter of incremental implementation until it's all complete. At that time, it can become the sole source for scheduling all appointments and client-related tasks or activities.

Existing CRM Users

For those migrating from one CRM to another, you will want to do a bit of research regarding data importing. This will ensure you can preserve the majority of the information collected and entered in your current CRM. Here too, you will want someone on the team leading the coordination of the CRM Integration. The coordinator can keep the team fully informed of where things are, as well as deliver training in incremental phases so everyone gets more comfortable with the new CRM.

Generally, it is straightforward to move the basic client contact information over. However, difficulties can arise when trying to pull over highly customized information, certain types of fields or custom-made action plans. Be prepared to set aside time for some data clean up and re-building of things like action plans and service models. Again, when it comes to data cleanup and getting automation or service models running, we recommend you begin with your top clients and work your way through the rest of your classifications.

In addition, before you implement any data importing, we recommend you take some time to clean and purge from your current database. There may be old or defunct contacts cluttering up your database and you'll want to delete them before you export. In this way, your new database will contain just the meaningful, relevant contacts (streamlined and ready to go).

Your CRM Transition Support

When it comes to support throughout this process, here are three sources you should be able to rely on:

- Client Support Services from the CRM Provider
- Your designated CRM Coordinator for the team
- Your Mindset Consulting Business Advisor

We encourage you to maximize the knowledge and information each of these very different sources can provide to you and the team.

It is ideal to establish a relationship with one key contact in the Client Support Services department. Ask if they have any recommendations around team training that they can send you-things like plans, checklists, and any other resources that would be helpful. You will also want to leverage online manuals, tutorials, and webinars to maximize training on the team.

Be sure to acknowledge the CRM Coordinator for your team will likely have less capacity for their regular responsibilities as they guide you through this process. This may mean other team members need to step in to help more on other tasks while the CRM Integration or Transition is still in its early phases.

Your Mindset Business Advisor is also here to support you during the new CRM adoption. They will circle back on all concepts covered to be sure you know which activities are on the action list for getting integrated. They will also be more than happy to have a break in the program to allow you to fully focus on CRM integration.

In addition, you may have someone within the firm who can also support you. This might be a specific individual or department related to the CRM or another team you know who uses the same CRM.