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FOR CREDIT UNIONS

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CRM Implementation Checklist

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Checklist Before a CRM Implementation



- ❑ **Validate which area of CRM you should implement first:** sales, service, or marketing. We recommend a phased approach.
- ❑ **Prepare your implementation** by identifying the key processes that will be impacted and identifying the communication plan.
- ❑ **Identify the data integration strategy.** Most CRMs will have a connector with the most popular Core systems and LOS. To build a true member 360, you will need information from other systems like card systems, online banking, contact center, etc.
- ❑ **Identify places where you need efficiency.** Which processes and how they can positively impact member experience? CRM is also about automation. What process would you like to automate and avoid clerical tasks like retyping information in between systems?
- ❑ **Where would you like to have approvals in the process?** Most CRMs are also business process management systems, not only can they automate process but also include an approval process and notifications, both internally and externally.
- ❑ **Where should members be automatically notified of specific steps in the process?** Don't forget it is not just an internal system, but a good opportunity to enable CRM to inform your members about specific events!
- ❑ **Plan your members' journey well.** CRM is about improving member experience. Strategically planning journeys and the experience you want your credit union to deliver at each step. It typically starts with onboarding.
- ❑ **Think Omni-channel.** Most CRMs have integration with, not only emails, but SMS/MMS (text message), social media like Facebook messenger, online chat.
- ❑ **Define your personas.** Personalization is key for CRM initiatives. Craft a personalization plan for small business owners, families, retirees, and future generations, among others.
- ❑ **Plan your campaign segment.** Ex: Financial literacy. When a member is below a certain threshold on the Credit Score, they can automatically be invited to an opt-in through a campaign.
- ❑ **Identify your internal champions.** Installation of CRM is relatively easy. The implementation effort is about managing the change it indicates. Those operational changes in the processes take time and employees need some handholding at the beginning. The communication plan that goes with the change management is very important.

