

Getting The Most From Your CRM: What You Need to Know

TechRounder PDF Edition

Live article: <https://www.techrounder.com/development/getting-the-most-from-your-crm-what-you-need-to-know/>

By Vipin PG | Published April 15, 2025 | Updated April 15, 2025 | Format: Article | 4 min read

In brief

There is no denying that a CRM can significantly improve business functions and operations. If you integrate CRM into your systems, you can enjoy many benefits and opportunities that you might not otherwise have had access to.

There is no denying that a CRM can significantly improve business functions and operations. If you integrate CRM into your systems, you can enjoy many benefits and opportunities that you might not otherwise have had access to. Such is their popularity and effectiveness; over 91% of businesses with 10 or more employees use CRM to help build their businesses and facilitate growth. However, once you have installed the right CRM for your business, what next? How do you ensure that you're using all the features and tools correctly to maximize your use of the software and deliver the right results for your company? Let's take a look at some tips that can help you out.

Check Your Data

Your CRM is only as good as the data you're giving it, so you should ensure your data is clean and accurate. This means performing regular audits of your contact data and identifying inaccuracies. By being proactive and responsible in this way, you can avoid mistakes or issues with incorrect data that should be entered into CRM. Clean and accurate data facilitate improved marketing campaigns, customer service, and improved success for your sales strategies, as well as ensuring data compliance as you're not storing anything that ends or will be detrimental to the CRM capabilities.

Set Clear and Specific Goals

There are, of course, different types of CRM that will benefit different companies due to the functions they have and how they operate. However, you need to ensure that you are setting clear and defined goals regardless of the type of CRM you are using. When you know what you want from your CRM, you're in the driver's seat. You can set your parameters to ensure you get the right results, be it increased sales, improved customer services, or simplify processes. Understanding your needs and setting clear goals empowers you to make the most of your CRM.

Training

Every single person who uses the CRM in any way needs to know how to use it correctly. The adoption of a CRM system into your business needs to be smooth, and even if one person isn't clear on how best to use the CRM, then you will get the setup or experience you want and need. You need to include training as a standard for everyone and ensure they're confident and competent prior to using it. It is a good idea to create guides people can take away with them to refer to or troubleshoot so they can work through issues if they come to access them. Because the more people are able to use your CRM correctly, the better the results you have.

Use Apps and Customize

You absolutely can and should customize the CRM for your exact business needs. You need it to match your processes and workflows smooth and integrate into what you do. Whether this is integrating with other systems and tools such as your email marketing tools or accounting software or you find apps that you can use to improve different features or aspects, for example, finding the top Salesforce AppExchange apps. You need to understand what you want and need from your CRM so you can perfectly customize it to deliver exact results and get the most from the software.

Automate Where Possible

Automation of your CRM processes is important to help you get the best of it. The more you can realistically automate, the better, as this will help to standardize results and simplify operations. It also ensures nothing is overlooked, and everything is taken care of and not missed. Top areas you can automate include follow-up reminders, task assignment and routing, lead scoring, and data entry and updates. These will improve the efficiency of your CRM to ensure it works for you.

Data Protection Matters

Data protection is a high priority for every business, and you need to adopt a strong data protection strategy for your CRM due to the volume of data it holds. Security is paramount to effective data collection and building customer trust. This needs to be integrated through the company, not just with your CRM, and security measures, including strong passwords, regularly changing passwords, updating user roles and missions, data law compliance, and strong authentication are a few ways you can improve your data security so you don't experience a breach. A CRM can be an amazing tool for your business and can bring many benefits, from improved efficiency to increased sales and compliance. However, if you are not getting the most out of it, then you are missing a trick, as CRMs really can be instrumental to your success.

References

1. ico.org.uk - for-organisations / advice-and-services - <https://ico.org.uk/for-organisations/advice-and-services/audits/>
2. pipeline.zoominfo.com - sales / top-salesforce-appexchange-apps - <https://pipeline.zoominfo.com/sales/top-salesforce-appexchange-apps>
3. hbr.org - 2015 / 05 - <https://hbr.org/2015/05/customer-data-designing-for-transparency-and-trust>