Declutter Your CRM To Increase Productivity and Efficiency

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In A/E/C, we have a lot of processes. Your company has a process for deciding which projects you'll go after. Your marketing team has a process for capturing information for use on proposals. You even have a process for how you start each morning when you get into work. But what do you do when those processes start to create clutter instead of efficiency?

If you're the boss, you can change those processes. Even if you're not the boss, you can still have an impact on what will work for you and your team. Decluttering is the process of getting rid of that which no longer serves you. It doesn't have to be decluttering your closet or your home. Decluttering can help in all aspects of your life, including at work.

Here are five processes you can use to declutter your CRM. These will help you and your teams be more productive and efficient so you can concentrate on winning more work.

1. Start from scratch. This is not ideal, but everyone needs to start somewhere. If your company is young enough or if your CRM consists of an Excel spreadsheet and you're just starting to use CRM software, this could be the easiest way to go. In fact, you could use the spreadsheet to start the process and then fill in missing information as needed.

2. Have a meeting with your user groups. The best way to figure out what information is relevant and what is not is to talk to the people who use the CRM. This is really the best way to start any decluttering process. If you live with someone and begin to declutter your home, you wouldn't just start donating or throwing away their stuff without talking to them first. So, when it comes to decluttering your CRM, it's best to find out who uses it and how.

3. Develop guidelines. Many companies with multiple offices will develop guidelines, from what types of finishes should be in the employee kitchen to room size and where equipment belongs. Everyone uses guidelines. After you've met with your user groups, a smaller group (most likely the marketing and business development team) should discuss the guidelines for purging information.

Your IT staff may have some guidelines regarding storage as well, so it would be good to interview them to see what their process is for backing-up, archiving, and purging.

4. Divide and conquer. Decluttering shouldn't be done alone. Find some champions within your user groups who are committed to making your CRM the best it can be. Then figure out how many records you will need to go through and divide evenly among your team. Another way to do this is by category. Perhaps one person handles all clients, and another handles all projects. It will depend on the size of your company and your CRM, but as a team, you can figure out what direction makes the most sense.

5. Pick deadlines. If you do not set deadlines to get the information sorted through and decluttered, the process could take years. Again, work with your team to figure out how long it might take on average and then set a goal. Maybe it's two records per day or you want to be finished before the winter holidays. Whatever you choose, make sure it's a team effort.

Once you have gone through the process and hit your deadlines, decluttering your CRM should become an ongoing process. The next time won't be quite as daunting. You can decide how often you declutter as part of your guidelines. ∎