Reality Check

It's the People, Stupid!

By Dick Lee

No, I'm not calling you stupid. The CRM industry as a whole, myself included, perhaps. But definitely not you. Nope, just playing off ex-President Bill Clinton's self-reminder from the 1992 election campaign, "It's the economy stupid," which he posted everywhere to avoid overlooking the obvious. Of course, that begs the question, "Is there something terribly obvious about CRM we're overlooking?"

Now, I know you would never do anything like this, but most CRMers look right past the people to the technology. Sort of like driving and focusing on that fabulous ice cream stand looming ahead, oblivious to the pothole that's about to break your ankle (oops, axle). And wonder of wonders, cars keep lining up to drive over the pothole. Reminiscent of that true Minnesota story where one turkey walked up a working corn augur to become non-vegetarian corn meal—and the rest the flock marched right up after him. But hey, we're smarter than turkeys…aren't we? I'll plead the fifth on that one.

Now, doesn't overlooking the people side of CRM and diving right into technology seem more than a little counter-intuitive to you? After all, technology has very limited capabilities to change customer relationships *directly*. Sure it can take web orders for commodity and reorder items, let customers configure products without a pesky salesperson purring in their ear, even tell customers why their damn shipment is late and how late. But even in these cases some smart people who understand what customers want and don't want has to tell the technology what to do and how to do it. And when these people don't know or don't care what customers want and use technology to perpetuate old workflow or old jobs instead, all hell usually breaks loose, and so do many customers. So even the "no human intervention" aspects of CRM are laden with human intervention—and all too often, human error.

As for the bulk of CRM activities—face-to-face and phone-to-phone customer interaction, conveying customer information throughout the enterprise, accumulating customer activities for information and analysis—technology is supporting people, pure and simple. The technology is useless without people driving it. And if folks just plain don't want to use CRM technology, or CRM technology doesn't support what they really need to do, people don't drive it. Which leaves companies paying mega-bucks for a bunch of seldom-used screen icons.

Seriously, you'd never try to implement CRM until dealing with people issues first, would you? Who'd ignore obvious stuff like finding out how the company is going to interact differently with customers, what that means to the work of departments and divisions, what *that* means to the work individuals perform—before even thinking about software?

You're probably muttering to yourself, "You'd have to be crazy (or dumb) to ignore the people stuff." And you're right about that. So which are we, crazy or dumb?

I'll vote for crazy for the same reason I don't want to call anyone "stupid." Yeah, it's outright crazy, buying CRM software before determining what people are going to do with it—and even more importantly, how we're going to get them to do whatever with it. Don't you agree?

How did we get so crazy? Was it something in the water? Something we ate? Something we smoked? Whatever happened, we really are acting like that dance line of turkeys fox trotting up the corn augur. And you know what, that "whatever happened" isn't that hard to identify, if we step back from CRM far enough and let reason take over.

Bottom line, *not many of us have even scant training in dealing with people stuff.* Even marketers go through their training without even completing a basic psychology course. "Oh, you took one?" "Well, good for you. Bet you feel lonely." But I'll guarantee that neither you nor almost anyone else in any discipline currently involved in CRM learned squat about dealing with people in organizational settings. I lucked out because I consulted with a couple of clients that are big time players in organizational development. At least I learned from them how little I know. But despite our lack of training and sensitivity in people issues, all of us have been thrown into a field—CRM—where changing how people behave is both the end and the means to that end.

What happens as a result is the equivalent of asking technical types skilled in writing computer code to rewrite genetic code. Hey—gotta rewire lots of folks if this CRM stuff is going to work. Not only can't they do it, but they close their eyes to the need to do something they can't do. And I'm not trying to lay this all on technical types. Virtually everyone involved in CRM suffers from this "ignore the obvious" syndrome.

But it's time for some resolution to this issue. CRM implementation after implementation is either stalling out or, worse yet, breaking an axle in that ol' pothole. By ignoring the obvious—that implementing CRM often requires massive changes to organizational structure and individual roles—we're putting CRM at risk. Either that or instead of ignoring the people side of CRM, we're letting CRM consultants deal with it, despite our abject lack of skills and training in this arena. But you wouldn't make mistakes like these, would you?

Where's the resolution? Ironically, considering how hard we've all worked to gain respect for CRM, it's in taking CRM seriously. Seeing it as something bigger than any one of us, or any one of our skill sets. CRM will easily eclipse the quality movement in degree of impact on how business is conducted. CRM changes everything, or darn near—at least it will if we treat it for all it is, not some quaint form of front-office automation. We're talking *very* serious stuff, indeed.

And how will we know that we're finally taking CRM as seriously as we should? For me, I'll see it by the presence of change management specialists participating in every step of CRM implementations. I'll see it when we're ready to invest in change, not software. I'll see it when we see technology as the easy part, and treat CRM software as the commodity it's becoming. But above all, I'll see it when CRM becomes an outgrowth of new, customer-centric, company values, which drive reorganization of the people in the company around customers, which necessitates re-engineering how people work, which we support with CRM software—and we regard all of that as changing the people side of business.

But I know I'm preaching to the converted…am I not?

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