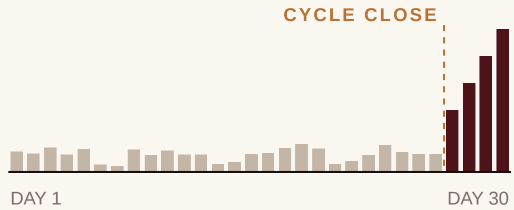
Is your CRM telling you the truth?

The system went in. The training happened. Two cycles later the activity report and the field tell different stories, and nobody can say which one is real.

WHO THIS IS FOR **Commercial leaders, sales force effectiveness and CRM owners.** Most useful if you are about to re-tier accounts, redesign a call plan or sign off a number built on field-reported activity.

Every commercial team I have worked with has a CRM. Most have a version of the same problem. Compliance reads in the high eighties on the slide, and everyone plans as though the data were not there. Nobody says so out loud.

Reviews ask whether the field is using the system. Wrong question. What matters is whether the record is **something someone saw, or something someone remembered**. Write up the morning after and you are reporting. Write up fourteen calls on the twenty-ninth and you are remembering, under pressure, against a target. Both go in green. Only one of them can carry a re-tiering.



READ THE SHAPE

Records created by day of month, one cycle. The volume is respectable. The distribution is the diagnostic.

A compliance number tells you the form was filled in. It tells you nothing about when.

FIVE QUESTIONS, IN THIS ORDER

1 **Ask three reps where they keep the notes they actually read before a specialist call.**

Not where they log. Where they look.

IF IT IS A NOTEBOOK, A PHONE NOTE OR A SHARED SHEET

The CRM is a reporting layer, not a working tool. Reach and frequency, call plan adherence and tier assignment are all sitting on top of a record nobody consults before the meeting that matters.

2 **Plot record creation by day of month, and against the incentive cycle close.**

One query. You are reading the shape, not the volume.

IF ENTRY SPIKES IN THE FINAL THREE DAYS

You are looking at recall written against a target rather than observation. Treat the cycle's frequency data as unusable rather than merely imperfect, and do not re-tier off it.

3 **Ask a first line manager what they did differently last week because of something they saw in the system.**

One specific instance. Not what the dashboard could show. What changed.

IF THEY CANNOT NAME ONE

The system is an audit instrument and the field knows it. The real management system is the conversation in the car, which leaves no record and does not scale.

4 **Count the mandatory fields on a call record, then complete one on a phone between appointments.**

Time it honestly.

OVER SIX FIELDS, OR OVER NINETY SECONDS

You are taxing the behaviour you are trying to buy. Every additional required field trades a little truth for a little structure, and the trade is rarely priced.

5 **Ask what happens to a rep who does not update. Then ask what happens to one who does.**

The second answer is the diagnostic.

IF THE FIRST IS A REPRIMAND AND THE SECOND IS NOTHING

The record costs the field time and returns them nothing. What you are seeing is a rational response to the incentive you built, not a discipline problem.

READING THE PATTERN

Fail on **1 and 2** and the tool is the problem. That is a design job and it is solvable. Fail on **3 and 5** and the tool is probably fine. You have a management problem, which is slower to fix and much less comfortable to say out loud. It is also far cheaper than the re-implementation most companies buy instead. Fail on **4** and you have bought structure by giving up the truth. Nobody prices that trade and almost everyone makes it.

Anita Menon. Eighteen years across Abbott, Amgen, Mundipharma, Novartis and Cipla. P&L ownership, regional operating models, launch execution, sales force effectiveness and CRM across six regions. Based in Dubai. Engagements contracted through Muziris Ventures, Ajman, UAE.

Run it, and tell me what you found.

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