

HOW TO GUARANTEE A SUCCESSFUL CRM IMPLEMENTATION

a seven step guide





Great customer relationships are the bedrock of a thriving business and the key to success. The Customer Relationship Management (CRM) software market has reached maturity and most vendors offer a proven set of functionalities to serve the needs of organisations today.

Implementing a CRM system can be a challenge, especially for small and mid-size companies that tend to have limited or no dedicated IT teams. With CRM comes also a review of the way the business operates, how departments get the job done and how they make decisions. A CRM project includes technology, people and business processes and all of those elements need to be considered in unison in order to drive success.

Having implemented CRM at hundreds of small and mid-sized businesses, Workbooks has become acutely aware of the essential ingredients a successful implementation has.

WE'VE MANAGED TO DRILL THIS EXHAUSTIVE LIST DOWN TO 7 SIMPLE CORE ELEMENTS...





Step 1 EXECUTIVE SPONSORSHIP

Active executive

ENGAGEMENT IS KEY TO SUCCESS.

For any CRM project to be successful there must be support from the leadership team. By support we don't just mean a willingness to sign the cheque (although clearly that helps!) but a true buy-in from the top that affirms the commitment of the business to the CRM project.

Business leaders must manage competing requirements and set business priorities. They must clearly define the management information requirements. If the CRM system is really going to improve the business, it will need to deliver good quality KPI's, so the right people can make the right decisions. If the leadership doesn't clearly define their requirements early on in the project, the CRM project is unlikely to deliver its promise. In SMEs, the leadership tends to be intimately involved with the workings of the company and the staff. If they don't see the CRM project as important, nobody else will.





Step 2 CLEAR PROJECT OBJECTIVES

Many organisations 'feel' they need a CRM system, but they are not entirely sure what it could deliver and how it will benefit their business.

We encourage you to really consider what you are trying to achieve by investing in CRM and how your business might be different in 6-12 months with a successfully deployed solution. What is the business case for implementing CRM? Without that, you'll struggle to drive the project, get it adopted and you'll be unable to demonstrate its impact.

It is also important to recognise that different teams inside your business will have different and often competing priorities. The sales team's number one priority might be more leads, whilst the customer services team might feel that a new support system is more important. Prioritising and clearly defining your objectives will go a long way.

And don't forget to determine from the outset how you are going to measure results and performance against those objectives.

we recommend
you ask yourself the following



**WHAT ARE THE HIGH
LEVEL OBJECTIVES?**



**HOW WOULD A
SYSTEM HELP ME
ACHIEVE THESE?**



**HOW IMPORTANT ARE
THESE OBJECTIVES
RELATIVE TO EACH OTHER?**

You may want to consider using the MoSCoW method to help set priorities for your project.

All requirements are important, but you may not be able to address all of them from the outset. You should prioritise to deliver the greatest and most immediate business benefits early.

For phase 1, focus on delivering all of the 'Must haves'.





Step 3

IDENTIFY YOUR CHAMPION(S)

Like many things in life, the difference between success and failure will be one person or a small group of people who realise the value of the project, understand the problems it's going to solve, and dedicate time and energy to making it happen.

You may want to consider choosing a (or a few) champion(s) of change within your organisation. When implementing CRM, you could consider starting with a single functional area and go with the domino effect. Choose a department with a manager who's behind the project, realises its benefits, and whose department will gain the most early on. Nothing jump-starts a CRM implementation more than someone who always has that 'can-do attitude' and gets people around him/her motivated. Once others begin to see success, they are more likely to follow suit.

Ideally your champion(s) will seek quick wins that will spearhead the project.

Don't forget that

CRM IS A JOURNEY,

but someone has to start it and get others to follow.



Step 4

GET USERS INVOLVED DURING THE PLANNING PHASE

Sometimes CRM initiatives are driven 'top down' with the business leadership keen to realise the value a good deployment can deliver. This is great – as we've said before – however, in the enthusiasm to get a system implemented, sometimes the people who actually use the system day-to-day don't get properly consulted. Put yourself in your users' shoes, look at the WIFM (What's in It For Me), understand their job and how the system will impact each of them.

You certainly do not want to reach a point where users resent the new system and don't see the value. Keep in mind that the new CRM will undoubtedly challenge what they are used to; and if they don't feel like stakeholders they can be resistant to change. The best way to avoid this is to get them involved, get their input early in the process so they feel they are part of the decision making process and contributor to future successes.

Larger organisations may have business analysts and business process experts but for small organisations the users are often the only people who really understand an existing business process. Therefore it is key to get them involved early.

we recommend



ESTABLISH A PROJECT TEAM RIGHT FROM THE OUTSET

(Include managers and users)



EMPOWER THE USERS' REPRESENTATIVES TO BE 'PROJECT CHAMPIONS'

Tasked with getting feedback and explaining to their peers and colleagues:

Why the CRM project is being started

What value it delivers to the business and to individual departments



Step 5

REVIEW & RETHINK PROCESSES IN LINE WITH THE NEW CRM

CRM projects are started because the existing systems and processes don't deliver the desired results. Simply replacing technology and not reviewing processes is unlikely to improve performance and output.

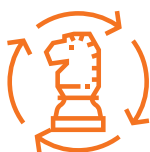
When implementing a new CRM solution, seize the opportunity to review and improve underlying business processes. Again user engagement here can be key. We often find that when asked, people running a particular process or function can identify ways to improve it, given the opportunity and the right support.

One of the challenges for SMEs is that most of the key processes such as order processing run across the organisation: starting in Sales and Marketing, progressing into an Administration function, and may involve a Fulfilment team before finishing in Finance. It helps to identify which processes run within a department (such as sales forecasting) and which ones go across teams. When a process runs across a business, it makes sense to get the stakeholders together to discuss how the process can be improved.

Always ask questions and challenge the status quo. Why do we do it this way? Are the factors that defined a particular process in the first place still relevant?

This 'review and rethink approach' doesn't need to be complex and a good CRM vendor will guide you through the process.

we recommend



BE OPEN MINDED TO CHANGING YOUR PROCESS,

rather than spending a lot of money and time on customising the solution to fit your existing process.



Step 6

UNDERSTAND WHERE YOUR COMPANY IS HEADING



You want to select a vendor that will

ENABLE YOUR SOLUTION TO GROW

as your company grows.

SMEs evolve at a really fast pace. Change is the constant. As your business grows, so will your requirements and the intricacy of your processes. It is critical that you ensure that the system you are buying and implementing will support you through growth. If you don't plan ahead, time and money can be wasted on additional add-ons / modules or point solutions. It is better to think ahead and factor this in from the beginning. Focus on what the business needs for the next 12 - 18 months, not for the next 5 to 10 years as your business will have changed before you get there!

we recommend



CONSIDER YOUR OPTIONS

before you embark with a vendor in order to ensure it is future proof.





Step 7

CHOOSE THE RIGHT PARTNER

The CRM software market is mature, so whether you are considering using Workbooks or one of our competitors such as Salesforce.com or Microsoft Dynamics, you will find that most solutions provide a rich set of features.

Review what you want to undertake yourselves (if anything) and where you need help. Consider what resources and budget will be required to support the implementation and ensure it meets your needs.

Is price the most important factor? Do you need help with the project design and implementation? To what extent? Have you considered user training? How will you migrate data from your legacy system(s)? What about on-going support?

One of the most important factors for a small & mid-size business should be to understand how much focus and support you are likely to get from your CRM provider. Will your business be important to them and will they go the extra mile to ensure you are successful? Ask yourself which partner will best accompany you on your CRM journey and help you the most in transforming your business. Make your selection based on technology, processes and people as all of these will impact your ROI.

we recommend



LOOK BEYOND PRODUCT FUNCTIONALITY

to see what else will impact your project success and deliver the ROI (return on investment) you expect.





The CONCLUSION

There is so much to consider when looking at CRM including strategy, technology, budget, change management etc. One strategy sure to cripple any CRM initiative is focusing purely on the technology and not on a legitimate business case for implementing a CRM system. Technology is the enabler, nothing more, nothing less.

CRM IS A JOURNEY OF IMPROVEMENT AND ORGANISATIONAL CHANGE.

A CRM project requires a focus on technology, people and processes and only when all three of them are in harmony will you truly maximise your ROI.

And yes, a new CRM initiative can seem daunting, but if you follow the golden rules highlighted in this paper, you will have solid foundations for success.