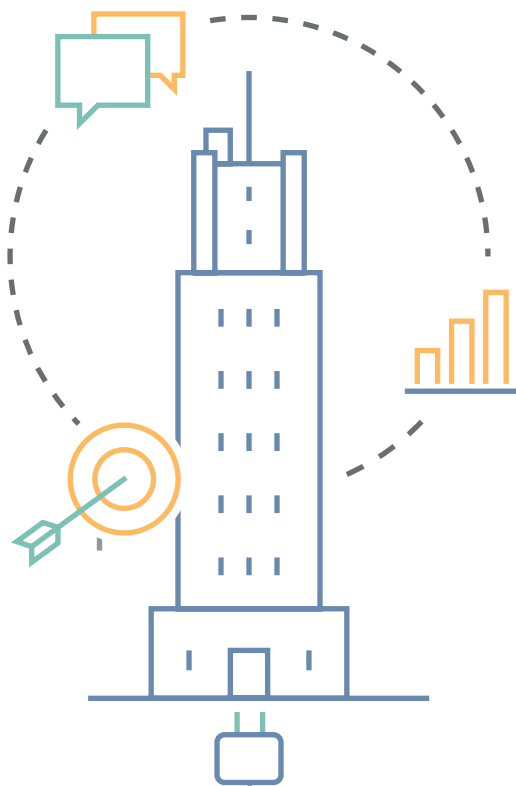


# CRM

## READINESS CHECKLIST



A successfully implemented CRM solution can deliver tremendous value to your organisation, helping you to **grow revenues and reduce operational costs.**



However, many CRM projects also fail to deliver the outcomes that were anticipated, resulting in expensive deployments that are poorly adopted by users.

At Workbooks, we have produced this CRM readiness checklist to help guide you through the process of:

- Clarifying the business case for investing in CRM and;
- Assessing if your organisation is ready to start a CRM project.



Step

1



## DEFINE YOUR OUTCOMES

What are the outcomes you are looking for with this project? How will your organisation be improved once CRM is successfully implemented?

Outcomes should be defined as improvements you expect to see within the organisation that actually create value for the stakeholders.

### Examples might be:

We want to...

- Grow revenues by x% by selling more to our existing customers
- Grow revenues by improving the performance of our sales team
- Improve the quality of the customer support we deliver and reduce the cost of delivery
- Improve marketing execution, so we can generate more leads and grow revenues
- Streamline order processing, so our staff can spend less time on admin and more time on other aspects of their role
- Make it easier for sales people to record their activities and produce their forecasts, so they spend less time on admin and more time with customers
- Improve the renewal rates within our organisation from x to y - thereby generating z in additional revenues

**NOTE:** Outcomes should not be technology achievements. For example having all our customer information in one database / a 360 degree view does not by itself deliver benefits, however it might help you deliver your business outcomes.



# CLARIFY VALUE

Can you define and quantify the value / benefits of achieving the above outcomes?

Once you have defined the outcomes, you need to be able to clearly articulate the value this creates for the organisation. This will be important to help justify the investment you are going to need - both in terms of money and time - to deploy a new solution.

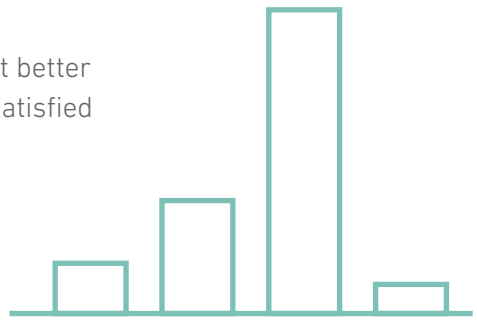


Ideally your outcomes will create tangible value e.g:

- We expect to grow our revenues by £xm over y years
- We can expect to save x man hours a month, worth y for the business

You will also have some softer benefits such as:

- Our staff will be happier because they spend less time on admin
- Our customers will get better service and be more satisfied



# DEFINE REQUIREMENTS

Can you describe a clear set of requirements for your CRM solution?

To ensure the project delivers the outcomes you are looking for, it makes sense to engage your entire organisation to help define a clear set of requirements that will form the foundation for your project.

This will also be helpful when you approach CRM vendors, requesting a demo and pricing.



Step  
4

## EVALUATE INVESTMENT

Are you able to evaluate the level of investment required, in monetary terms, time and effort?

In order to clarify and build the business case for your CRM project, you will need to have an idea of the investment required.



If you have defined your outcomes well enough, a good CRM vendor should be able to give you some indicative costs of what would be involved. Ask providers to talk through similar projects with you so that you understand the scope of such a project and who would do what etc.

Make sure you understand what resources internally you might need to deliver the project. All will need to be taken into account in order to define the cost / investment required for the project.

## WHAT IF YOU DO NOTHING?

What is the impact of doing nothing?

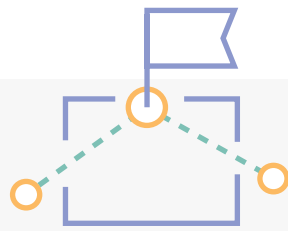
You are considering a CRM investment... but of course at this point you still have the option to put CRM on the back burner and revisit it at some future point.

However, it is worth considering the impact of doing nothing. Are you missing opportunities for growth? Will customers move away because they are unhappy with the level of services? Will staff leave because of poor systems?

Step  
5



# READINESS



## Step 6

Use this section to assess how ready you are to adopt CRM. Below are a set of questions you should be asking yourselves, complete the orange circle with a Yes (✓) or No (✗) to determine if you are ready to get started.

### Have I built a robust investment / business case for CRM, with clearly defined outcomes and value?

If you have completed the previous steps, you should have a good business case to justify the investment CRM. If you don't do this, you are likely to waste a lot of time evaluating potential solutions, without clarity on why you should invest.

### Do I have Executive Sponsorship?

The most successful projects require support from the executive team, both in terms of signing off the investment and supporting the implementation process. Ask yourself: Will your Execs get involved and help lead the change?

Without that, you'll struggle to get the project off the ground and get adoption across the business.

### Do I have a budget signed off with the right level of investment?

You will need a budget for the project, but we also would recommend getting some contingency signed-off to ensure your project can get to completion. But do not share that information with your supplier!





## Do I have a clearly defined set of business requirements?

You will have a mix of functional requirements (which features you will require) and supplier requirements (are they local, can they provide training, etc.). Before you engage with potential vendors, make sure that you have clearly defined these so that you can compare proposals based on a common understanding.

## Do I have a clear scope for phase one?

Any CRM deployment is going to be a journey; as you become more familiar with the solution you will see more opportunities to improve things. However, you need to define a phase one scope, including success criteria so vendors can give you a price for implementation.

## Have I defined a vendor selection process?

How are you going to shortlist your vendors? Who within your organisation will be involved in the process? Do you want to produce a formal RFP or just discuss requirements with selected vendors? Do you want references, etc.?

Make sure that you have clarity on the selection process before you approach vendors.

## How shall I select the right vendor?

There are a lot of CRM suppliers in the market, many have similar solutions. How are you going to decide between them? It is good practice to define a selection framework that includes how important price, functionality, look & feel, vendor support, vendor fit, etc are to you. This will help you make the right choice for your business.

## Do I have the resources I need?

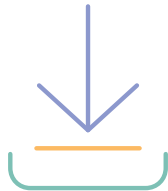
What level of internal resource will you need to dedicate to this project to ensure it is implemented successfully? Do they have the skills and will they be available when you need them? If not, can the supplier provide such resources / skillset and is this support covered in the budget you have allocated to the project?



## ARE YOU READY?

Our CRM requirements template helps you collect input from all parts of your organisation.

Download a copy [here](#).



## NOT SURE?

Not sure about how to translate your business objectives into CRM requirements?



You are not alone!  
We are here to help.

## CONTACT US

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