Key Steps to a Successful CRM Implementation

As you undertake your CRM implementation, before we get into a lot of specifics, you should understand that there is one overriding attribute to any successful CRM implementation. This common factor is open and frequent communication and collaboration.

The typical groups (or to use the recent term – stakeholders) that are going to be significantly affected by a new CRM system, and therefore will need to be involved in its selection; development and delivery are the following:

- Executive sponsor
- Project Manager
- Implementation team
- Lead trainer
- Internal or external network administration and MIS
- Finance management
- Sales management
- Sales general staff
- Administration management
- Administration general staff

This group will be your CRM implementation team.

Successful CRM implementations share another important factor. The implementation team should manage the project relatively conservatively - set realistic goals, phase the implementation in modest steps, and view the entire process as one of continual improvement, not as a one-time event. It's been said… "Think big, start small, and move quickly." Another important factor in any successful CRM implementation is to review the different user groups, especially the last five groups listed above – and make sure that in your first implementation each of these groups perceives some value to them personally in making the effort and commitment to support the development and to use the system once it is implemented. For example – sales general staff may be motivated if the system calculates commission reports – and will be receptive to the argument that the numbers will only be correct if all opportunities and closed sales are in the system.

Planning the Implementation

Now that we have those most important principles in the front of your mind – let's plan your implementation.

First – you need to look at the list above, and translate it into the right people, and the right number of people, in your organization. Clearly, the size of the group and the planning effort should be appropriate to the size of the business. For a ten-person organization, likely 3-4 people need to be involved in the implementation. For a company of about 25 people – probably 6 or so people have a role to play. This quickly tapers off, and in a 200-person business you will still need no more than 10-12 people to be involved in the CRM implementation process.

Your two most important players are the executive sponsor, and the project manager. Your project manager will provide the drive to ensure the project is executed successfully, and your sponsor will provide the encouragement and resources to all other participants to play their part as well. Commonly, the executive sponsor may be the President or owner, the finance chief, or sometimes the sales manager. If you have an in-house MIS group, the sponsor should not be someone from that group. You need the business and people part of this equation to work out properly, as well as the technology – and really, the technology part is not the biggest risk. You need to be sure that the CRM implementation is being undertaken because of perceived business process shortcomings, and that the chosen solution has been selected because it best addresses them. Your project should not be driven by a technology push, but by a business pull.

Your project manager needs to be someone inside your organization, not someone contracted for the job. They can work closely with their opposite number on a vendor's implementation team, but they need to be someone that all the stakeholders know and trust. As well as being a person known for being very competent and detail-oriented, you need someone who is also known for communicating openly, taking suggestions, and not being overly political. If the people participating in the implementation team feel they are just window dressing, and not really involved in the process, they will quickly turn negative. If the solution feels 'imposed' staff will react with cynicism, resistance, and at best low commitment.

Your project manager needs to be your champion – someone with the people skills to get employees throughout the organization excited about the new CRM system. And as the implementation will require a lot of work from your project manager, you need to address their normal workload to make room for the CRM-related work.

Like any initiative, it is likely best to work from something other than a blank sheet of paper. While you do not want to present the CRM implementation team with a fait accompli at the first meeting, neither do you want to simply ask them what you think should be done – what are the goals, and what are the potential technology solutions? In order to focus and manage the process of agreeing a specific set of goals, a specific technology solution, and a particular vendor for customization (if that is within the scope of your first implementation), it would be advisable for the project manager and the executive sponsor to prepare an initial briefing note for the first meeting – stating what some of the key perceived shortcomings are in the current business processes, some of the potential solutions, the make-up of the CRM implementation team, the proposed timeline, and candidates for the technology to be used.

In terms of the technology candidates, it is best if all solutions on the short list of candidate systems have demo versions available for members of the team to try out. Clearly, given that you are reading this document, it seems that **Info@Hand** has been selected for the CRM technology. But it is essential that all opinions on the subject be heard. By having the CRM implementation team meet regularly for a few weeks, and do offline investigation and preparation between meetings, you should quickly get to a set of business goals, as well as an agreed-upon technology base and specifications for customization. These specifications can be as simple as printed copies of screen layouts with changes marked on them. That is where you need to get to before you talk to anyone outside your company.

As a checklist, here is what your planning needs to achieve:

- ☐ Executive sponsor identified
- ☐ Project manager identified
- ☐ Members of the CRM implementation team agreed
- ☐ Initial briefing note generated for the first team meeting
- ☐ First meeting held
- ☐ Responsibilities assigned for investigation and team briefing on key topics – these topics include:
    - Business processes needing improvement
    - Suggested improvements
    - Identifying the top three goals for the implementation
    - Base technology to be used
    - Candidates for vendor to perform implementation and customization
    - Suggested goals for phase one of the implementation

- Suggested implementation schedule for multiple phases
- Approach to data migration
- Approach to training
- Approach to stepwise introduction within the organization

- Briefings delivered at later meetings, and key decisions made on the topics above

Clearly a larger organization will perform a more comprehensive and slower version of the process above, and a smaller one will have a more abbreviated and faster process.

Some Common Pitfalls

Just to underscore the points made in the section above, and to highlight the importance of planning and communications to the CRM implementation process, here is a list of some of the classic mistakes we unfortunately see at more client sites than not:

- Failure to get someone to take ownership of the process from start to finish
- Failure to involve your stakeholders, especially the end-users, right from the requirements gathering stage.
- Not having a focus on the current business process, the intended business process improvements, and the specifications for a system that will effect that change.
- Thinking that implementing a CRM means buying CRM software, installing it on a server and then telling the people who need to use it.
- Not making a particular and continuing effort throughout the project to communicate the benefits specific to each user and stakeholder, to ensure their buy-in.
- Biting off too big an initial project phase, or simply proceeding as if phases are for sissies. This will load too much expenditure up front, delay implementation and make the gap in time between initial good will and early project successes too great to bridge.
- Pursuing too rigid a development process. CRM systems are more about people than they are technology. A process such as Agile Programming (Google will show you a nice article on the topic by Martin Fowler) is the sort of approach that you should use. In this approach early prototypes are used to generate feedback, and successive iterations of the user interface ensure that users feel involved, empowered, and happy. Few business users can picture every last detail of a system or screen at the outset. And few system architects know exactly what users want. Get fairly close, then try it out, and make adjustments. Repeat if necessary!
- Not training your trainer early enough, not giving them enough resources to train all users thoroughly, and not planning the roll-out to allow for sufficient training time.
- Failing to define what a successful implementation looks like at the beginning of the project.
- Failing to institute a periodic review of the CRM system, and continuing phases of development, to further improve business processes and user satisfaction.

It Takes a Team to Win

As we saw above, a CRM implementation needs the involvement of a whole team of participants. Yes, the executive sponsor and the project manager are of particular importance, but each person or group represented on the team is important, and must be continually involved in the process from beginning to end.

This continual involvement, and the ongoing effective and frequent communications between all team members, is the one thing all successful CRM implementations have in common. Like the introduction of any new business initiative, people know when they are truly involved, or just being invited to meetings guided by an elite few in an attempt to win their cooperation. The team members that are in management positions should typically be involved in the odd 'pre-meeting meeting' to ensure they are familiar with a

specific CRM system, or a solution to a business problem, in advance, so that they can back it up in front of the whole group, or help make a change before it goes to the whole group.
One of the most common errors seen on CRM implementations is not paying enough attention in the team collaboration process to input from general sales, operations and admin staff. The whole nature of a CRM is that management will have no data to analyze if these people do not use the system regularly. These people need to be onboard for two very good reasons. One is the functional reason that they can best determine what an efficient data entry process is and what list views and reports are needed for everyday use. The second is the human element - the implementation needs to win these people over, and everyone reacts more positively when they are involved and have their input heeded, than when a solution is imposed on them.

Some of the techniques you may wish to use in managing the CRM implementation team (depending on the size of your business) will include:

- Define email groups to keep the entire team up to date – psychologically it makes everyone on the team a peer.
- Have the team meet physically once a week throughout the requirements definition process, and have the entire team physically sign off on the requirements.
- During development, the team can meet once every two weeks to review progress against the schedule, and to review any escalated issues.
- Once the first pass of development has been completed, the team should again meet once each week. Continue this until the entire organization has been deployed.
- Assuming there are no critical issues, have the team meet again a month after deployment has been completed, to review initial feedback, and make or plan adjustments.
- Meet again, three months and six months after initial deployment, to perform further reviews.

Setting Project Goals and Specifications

In the initial briefing note presented at the first meeting of the CRM Implementation team, you should include suggested project goals, couched in terms of current business processes and the manner in which they should be improved. You should also have suggested timelines and phases to the implementation process (if required).

After some initial discussion, and depending on the scale of your business and the CRM implementation, one or more team members should be tasked with documenting in detail the suggested project goals. These can be presented and agreed at later meetings. It will help to first simply agree the manner in which each business process can be improved, and not focus on CRM technology.

This approach enables the team to first address the business requirements, and then assign one or more members to identifying a suggested shortlist of candidates for the core CRM technology to be used for the project. That shortlist should then be presented to the entire team, and a winning candidate agreed, that appears best suited to satisfying the agreed business requirements, and which also has credible references.

Then the team can generate and agree some sketches and specifications of suggested screen layouts for list, detail and edit view screens. These may be only minor variants of the existing CRM screens, or they may require heavy customization. The overall project timeline and phases foreseen to complete it should also be discussed and agreed at this stage.

Once the team has developed and agreed on a set of detailed project business goals, identified the desired project timeline and phases, agreed on a core CRM technology (at this point we suspect you picked Info@Hand from CRMonCall!), and developed detailed drawings and specifications, it is time to look for the CRM development partner who will put your CRM all together for you, and will in effect join the (previously internal members only) CRM implementation team.

Selecting a CRM Implementation Partner

If you think you can do this without external help – you may wish to think again. Ask yourself these questions:

- Have I worked through dozens of CRM implementations and gained insights into what can go wrong and why?
- Have I got experience in data import and massaging techniques gained from years of CRM implementations?
- Am I comfortable with my ability to interpret a business process into software workflow and screen designs?
- Will I inspire the confidence internally that an external domain expert can?

Your first task in the process of finding the right partner is to assemble a short list of candidate firms. Look in the yellow pages under Customer Relationship Management, by all means, to get started. One of your best sources of good information is your peers who are running their own businesses – ask your professional colleagues if they have any positive recommendations of firms focused on this type of work. Another way to find potential partners is to look on the web site of the CRM software you intend to implement, and look for their approved development partners. Make sure you find a partner focused not just on selling or hosting the software, but also on the development of custom enhancements to the standard software – as you will need some without doubt. **Info@Hand**, for example, on www.infoathand.com, has a list of their partners organized by country, with links back to the homes pages of each of those organizations. Nor should you necessarily rule out a partner because they are not in your city or country.

Before you make your final selection of a partner, the team should likely make a tentative selection, based on initial specifications and the candidate firms' estimated development budget. Then you should work together to jointly develop a final agreement with a very detailed specification, and a fixed development cost. If you can do that successfully, you have your CRM implementation partner. Once you make the final selection of your CRM development partner, you will likely have to make a substantial initial deposit against the development work to be undertaken and then you are off and running!

CRM System Design

The typical CRM design process, even within a single phase of an overall CRM implementation program for your business, is broken down into a number of major areas – such as enhancements to be made to the accounts model, to contacts, to projects, etc.. as well as the custom reports and charts you may well need.

While some of these alterations may interact with each other, many of them will not, and clusters of functionality can typically be identified which are fairly independent of each other. Usually the best practice is to have the partner develop these off site, and then introduce each new function-cluster to you for evaluation one at a time (typically through a development web site which is exposed just to you). Unless you have spent the time and money to develop a remarkably detailed specification, there will always be issues such as "I thought that control would be a drop-down, not a radio button", or "I wanted the tab order of these fields to go like this …", or "When you select a value in that field – this other field is meant to be pre-populated".

Performing initial acceptance testing on each function-cluster one at a time lets the internal CRM implementation team focus on it clearly, and ensure that they get it implemented exactly as they need it. Then they can move on to the next function-cluster, and so on until a full first pass of the application has been implemented and accepted.

Now full acceptance testing on the integrated CRM application should be performed by your team and a formal sign off performed against a specific revision of the software on the evaluation web site. Once that has been done, the CRM application is either hosted by a hosting supplier (which may be your CRM implementation partner again), or the now custom CRM application software is delivered to you for installation on your own server hardware. If the latter, you will need a further brief acceptance test of the application as installed on your own server.

Data Migration

While the acceptance testing is going on, any past CRM or contact manager data which you wish to import into your CRM solution should be getting prepared, converted, and imported. Data import, checking and cleanup can itself easily take weeks to perform (when there is lots of data, and it comes from an awkward and complex source format) – so make sure to allow sufficient time. Do not think that the big job is to get the data into the CRM, and that you can clean it up afterwards. The big job is to get the data cleaned up. Ask yourself – are there any transformations that should be performed on the data while it is outside a CRM - the assignment of accounts to users, for example – by postcode perhaps? Will you design and run a scan for duplicates? When you have signed off on the implementation process and design/development process, and your imported data looks just right – you are ready to start introducing your new CRM to the most important people in the process – its users.

Pilot Testing

Pilot testing of the CRM is a critical step of the process. Each section of the CRM should be tested by a user that is most dependent on that section working optimally. Sales management should test the pipeline charts. Sales staff and Finance should test the commission reports. Sales, service and admin general staff should test the usability of account, contact, opportunity, lead and case screens. Admin should evaluate management reports, and so on.

Keep things in perspective… a year after your implementation, no one will remember clearly if it was on time, or on budget. All they will remember is if you produced a system which is now a critical part of the organization's business processes, if they like the system, and if they felt a part of its introduction. So – project managers - don't be afraid to send the system back for re-work if the initial pilot testing indicates significant dissatisfaction with the usability of the system, or the accuracy with which it adheres to the desired business processes.

The CRM Training Process

CRM training has two goals – and only one is to make the user base familiar with the system and how to use it. The other goal is to generate positive momentum for the implementation, and enthusiasm in the user base.

To accomplish this latter goal, you need to make sure people generally like what they see – especially the general sales staff, and to some degree the general administrative staff – as these are the two most likely sources of resistance and negatives reactions.

Therefore your approach should be as follows:

Session 1: Initial Management Training and Product Exposure

Goals:

- To create awareness in Senior Management, to stimulate questions, and to discover any shortcomings early, within a controlled group that consists of those individuals most likely to be supportive of the CRM implementation and its goals.
- To finalize and clarify all system access details with MIS.

Attendees:

- Lead trainer

- Project Manager
- Executive sponsor
- Internal or external network administration and MIS
- Finance management
- Sales management
- Administration management

After the first session, all the attendees should be encouraged to go off and use the system, enter live data, and take note of any problems, questions or dislikes.

Next Steps:

- A week later, this same group should re-assemble for session 2.

Session 2: Management Training Completion and Issue Management

Goals:

- To complete the management training, so that senior management has a good understanding of the system's capabilities, and how to operate the system.
- To make management enthusiastic about the system.
- To ensure management's full support of the broad introduction of the CRM system.
- To allow management to answer questions about the system knowledgeably, and to correct any misinformation later on from staff.
- To address any management concerns about the system function, clarify any misunderstandings, and identify any last-minute system shortcomings that must be addressed prior to general introduction of the system. .

Attendees:

- Same as session 1. MIS optional.

Next Steps:

- Any mandatory fixes must be identified, documented, summarized, agreed by the CRM implementation team, and then developed and applied.
- If any fixes were required, this same group should re-assemble for session 3 to review the fixes.

Session 3: Present Final System Adjustments (Optional)

Goals:

- To reinforce the perception that the system will evolve over time, and will genuinely be guided by the needs of its users
- To ensure management's full support of the broad introduction of the CRM system.

Attendees:

- Same as session 1

Next Steps:

- Schedule session 4 a week later.

Session 4: General User Training Session

Goals:

- **Note**: There may be multiple classes scheduled for session 4. No class should have more than 6 users in it. Separating users by department is a good idea – Sales will have questions on different topics than Admin.
- To present the CRM system capabilities and method of operation in a comprehensive and logical manner.
- To stimulate class participation and questions.
- To record user feedback and open questions.
- To define initial goals for scope of use. (Departmental management participation is mandatory for this.)

Attendees:

- Lead trainer
- Project Manager (not all sessions if there are many)
- Sales management
- Sales general staff
- Administration management
- Administration general staff
- All other general staff that will use the system

Next Steps:

- Optional follow-up session 5, two weeks later.

Session 5: Training Completion (Optional)

Goals:

- To close off any open questions
- To address any questions which have arisen in the last two weeks
- To re-present training sections where users seem uncertain
- To ensure a positive attitude on behalf of all users
- To record any outstanding concerns or issues

Attendees:

- Lead trainer
- Project Manager
- All staff that wish to participate

Next Steps:

- Presentation of training results to CRM implementation team, including any outstanding issues identified

CRM Training Materials

The most important pre-requisites for the CRM training sessions are:

- A good trainer that can understand the business context, as well as relate to the users at their level.
- A quiet training room, with overhead projector connected to the laptop/PC of the trainer, a meeting table, and plenty of room for all attendees.

- A group of no more than six attendees… to create a constructive learning environment and to prevent any impersonal ‘mob rule’ negative feedback events from having a chance to start.
- All users to have been pre-configured in the system prior to the session, so they can see themselves already set up as users, and so they can use the CRM system immediately after the session if they wish.
- Optionally – you may wish to allow users to have their own PCs or laptops in the training session, to experiment with the system. If so – only allow laptop/PC use after initial orientation in the system is complete. Be prepared with slips of paper with sign-on URL, user names and passwords if you do this.

Expect each training session to be about 90 minutes long. Any longer and attendees will want to avoid them - attention spans will only stretch so far. While the various sessions outlined above have different goals and attendees, the material to be presented at the main sessions (1 and 4) as well as used for backup material at the reinforcement sessions (2 and 5) is largely common.

Final Thoughts

As you can see, a company’s the CRM platform and implementation partner choice will have a tremendous impact on the eventual success of a new CRM System deployment. CRMonCall.com has years of experience working with companies in a broad range of industries. CRMonCall was chosen as a premier North American distribution and hosting partner for Info@Hand, The Long Reach Corporation's flagship CRM product line. With the combination of The Long Reach Corp's vision and leading-edge development expertise coupled with CRMonCall's national customer support presence and proven system implementation process... your organization can be assured your investment will reap rewards for years to come.

CRMonCall.com is not your typical CRM solutions provider. Unlike many solution providers in this space, what distinguishes us is the fact that we are a Company of… first, business professionals… then technology specialists. Yes, we have technology skills galore, but as importantly, the CRMonCall team has broad experience in a variety of functional business areas in their past corporate or entrepreneurial lives. As such, we’re able to partner with our clients and often bring fresh insights and approaches to the table as we implement our leading-edge solutions. We’ve purposely crafted a business model which is structured to assure our success hinges on our client’s success. Feel free to contact us to coordinate a no-obligation discussion around your company’s CRM needs.

* Thanks to Michael Whitehead, of The Long Reach Corporation, for guidance and support in crafting this guide.