Tips for successful CRM implementations

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Introduction

There might be different sets of criteria for every client on what constitutes a successful CRM implementation, and often times project success criteria might be independent from the application itself. In my experience, the majority of the challenges have been the clients' business processes, inter- and intra-department structure, and unrealistic expectations of a CRM rollout.

What I am about to share with you are some tips that have worked for me in every CRM implementation that I have undertaken. Most of these implementations have varied in their complexity, audience, and in the functionality combination that needs to be implemented: whether it is call centre, helpdesk, sales force automation, or marketing campaign management. I have had several different product experiences with several different vendors and consultants. The following tips are the main common factors that have worked for me in implementing CRM application:

1- Understand your *audience*

2- Understand business *Scope & Requirements*

3- Understand the *elements that constitutes successful implementation*

Understand your audience

Understanding your audience is one of the main crucial elements in the success of CRM projects. Audience can be defined by core project implementation team members, a sponsor, and stakeholders. It is important to have a steering committee that has representation from all members. In addition to understanding the audience, it is even more important to understand the role of each member of the audience. Part of establishing roles and responsibilities for the project team is identifying the decision making process, escalation procedure, and milestones commitment. A successful CRM project will ensure the completion of all the above, with approved written sign-off from the sponsor and all stakeholders denoting the project governance. In addition, there is a need to define the communication process, information dissemination, meetings frequencies, etc. Understanding the project audience, agreeing to roles and responsibilities, and having project governance are the main keys to unlocking many rising issues during the course of CRM implementation projects.

Understand business Scope & Requirements

Understanding the business scope is crucial in the success of CRM implementation. Before rushing to fit a CRM application to solve a business problem, there is a need to understand why a particular business does what it does today, and what opportunity the business is looking to take on. What would be the impact of a particular process change on the CRM implementation? While defining a scope, all identified stakeholders must be involved in the gathering and review process and proper gating or

sign-off must be in place to ensure that the authorized stakeholder will sign-off on the final scope in terms of what is in scope and what is out of scope.

Once a scope has been identified and agreed upon, then requirements play a major role. Identifying, gathering, and documenting requirements play a main role in the success of any CRM implementation. The CRM requirements gathering process can be very challenging because it crosses single department boundaries and touches the entire organization. Gathering requirements cross-functionally can be challenging due to the necessity for capturing peoples' continually changing needs, and keeping an eye on the impact on other business functions within the organization, as well as staying within the defined scope. Requirement gathering can be tedious; however, it can be a rewarding process at the time of implementation.

The detailed requirements document should include features, functions, workflow, and integration needs. Then requirements should be prioritized to help CRM vendors understand what must take place, and what can be deferred for later phases. What worked for me was defining the big picture, knowing what to phase and when to phase it, and then acquiring stakeholders' approval on the priority of the proposed phased implementation. Issues such as data conversions, various interfaces, and customizations should be all addressed with the vendor during the requirements gathering process; therefore, there are no surprises that may impact the project flow.

Understand the elements that constitute successful implementation

Understanding the audience and understanding the business scope and requirements are some of the elements that contribute to the success of CRM implementations. In addition, there are many other elements that contribute to the success of CRM implementations, and these elements are less visible. These elements consist of manpower, processes, and then application. The sponsor and stakeholders should be educated by vendors and the core project team in the early stages of a CRM implementation that a successful CRM implementation does not consistent only of implementing the application.

Many false assumptions are made regarding what CRM can and can not do. The reasons for such assumptions are a lack of understanding of CRM capabilities; and due to the false expectation that CRM applications are made to fix broken processes (sometimes it may, but not guaranteed). Any CRM application alone would not be able to fulfill the business requirements without understanding those issues.

To a sponsor, elements of success could be to provide better streamlined business processes. To some stakeholders having a sales force automation system will improve sales revenue; while others think that there would be better control over the sales people if they had CRM implemented.

From my experience, understanding business processes is a key to determining what business rules and processes need to change, and what needs to stay ensuring that the

application will accommodate either scenario. On many occasions, I have seen some CRM applications get heavily customized following immature business processes which cause fingers to point at the implemented CRM application. Therefore, documenting all successful criteria as seen by stakeholders, and not making any assumption regarding the success of the implementation is a key to successful CRM implementations.

Conclusion

CRM implementations are complicated only if we make them that way. Proper planning and an understanding of all the elements that constitute success will bring on a successful CRM implementation. Whatever the elements mean to different stakeholders, the success of CRM implementation lies in identifying them, confirming them, and based on that, implementing the system that will ensure delivering these elements.