ARE YOU READY FOR CRM?

Microsoft Dynamics CRM

What you need to know before starting a CRM project

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ARE YOU READY FOR CRM? WHAT YOU NEED TO KNOW BEFORE STARTING A CRM PROJECT

One of the biggest challenges that business and IT professionals face when starting a new CRM initiative is to determine how true business value can be derived from their efforts. When done optimally, CRM solutions can provide a considerable return on the investment. Companies know this and aim to do it right in order to maximise their CRM returns. Sounds smart, but what we often see is that companies struggle with how to go about this in the best way possible.

The companies making these mistakes typically start by spending a great deal of time, too much time, doing internal research, analysis and defining business requirements. This is time that would be better spent on actually implementing a solution. They often spend little to no time making a business case and understanding the real value of their initiative.

From our point of view, this is the component that drives the success of the initiative! A final mistake is that they spend very little time on preparing the organisation for the change, which is a crucial factor to the project's success.

Being ready doesn't mean a detailed requirements list is ready, it means you have an idea of where to find your business value and how the CRM initiative will impact your organisation

We recommend a very different approach – an approach based on the insights and experiences of our most successful projects. We know that the project success is linked to how the project begins.

So if you are at the start of a CRM initiative, or ready to start making significant progress, we would like to provide you with the most important steps to truly get you ready for CRM and on your way to start earning returns on your investment.

THE FAST TRACK TO KICK OFF SUCCESSFUL CRM IMPLEMENTATION

1. Get a general overview of the business areas and processes involved, but don't dive too deep early on.
2. Develop a business case to understand how the project is going to yield a return on the investment
3. Identify who's who in your organisation when it comes to building the solution, but also sustaining its value to your business.

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1. DON'T DIVE TOO DEEP TOO SOON

Get an overview of the business areas and processes involved, but do not do detailed requirements gathering at the start.

It's not uncommon for companies to spend from 6 months all the way up to 2 years on an internal requirement gathering process before they even start the actual CRM project. Needless to say, taking such a long time before making an agreement with a partner, selecting software, or before any implementation is even started is not a good way to ensure an ROI. In most cases, the companies could have started right away and gotten their implemented solution to the market much faster.

Considering this, most CRM projects could be implemented, as in live, in the same amount of time that most companies take to do just the analysis. That is a long time to wait (and money wasted) before reaping the benefits and gaining a return on the investment.

We see it in a different light

Most companies believe they are ready for CRM when they know their requirements. We see it differently.

Being ready does not mean a detailed requirements list is ready, it means you have an idea of where to find your business value and how the CRM initiative will impact your organisation. Then it is just a matter of getting started.
Organisations are dynamic and continuously evolving, so chances are that if you spend 6-18 months delving into the details, those details are only going to change during the course of your analysis. You will also delay your launch and thus miss the opportunity to reap the rewards much earlier.

When you start the work with your CRM partner you will reach a new awareness of the possibilities. So to be most effective with the time spent before an engagement we recommend that companies focus on the overall processes and where they can deliver value, rather than on specific detailed requirements.

Don't delay your ROI by using all the time up front analysing the possibilities - get an idea of where you can get the business value and move forward. In summary, understand the areas you want to go into, but do not go deep into details, go into it with your solutions partner onboard and save your company time and money.

2. SHOW ME THE MONEY

Know how the project is going to yield a return on investment.

Defining your business case will ensure that whatever you build is going to drive a return on your investment. Successful clients that are set up to maximise their CRM initiatives first create a business case. This allows them to tie the work directly to the intended value it will provide.

The business case is the process of digging a bit further to see where the organisation is currently performing in a number of key areas. It is also a time to see what the quantitative result will be if processes are improved through CRM. Taking the time to develop a business case ensures the CRM solution will drive value and, therefore, the ROI. With the business case in place, it will also allow companies to determine the success of the project once it is implemented.

To create the CRM business case we recommend that you identify the potential business value derived through the initiative, estimate the complexity and conduct a cost/benefit analysis. It's an investigation that varies for each organisation and can include relative business units, processes, users and customers.

In addition to aligning stakeholders, a business case creates a clear foundation and direction from which to move forward with the most appropriate CRM solution. This will allow you to spend less time guessing and more time creating value.

3. IDENTIFY THE RIGHT PEOPLE IN THE ORGANISATION

Determine your who's who: Who do you need during the project to secure a solution is built that serves the business and who do you need after the project to ensure the solution stays as dynamic as your business.

Aligning the organisation around a new way of working is critical to the success of the CRM initiative. A focused investment in the people and creating a culture responsive to change is fundamental to a successful outcome, yet this is often an area that is neglected.

Companies are typically better at focusing on the strategic change management, the 'why are we doing this', but major issues start to surface with the operational side of change management if a plan is not carefully considered.

Who are the right people in your organisation to secure that the solution built will serve your business? Who do you need after the project to ensure the solution stays as dynamic as your business? Start simple, but get to the point of making a sophisticated and integrated organisation plan. This is a critical step.

Spend the necessary time upfront preparing the organisation. Take the change management perspective and thoroughly clarify and identify who will take part, what the expectations and responsibilities
are and how the implementation will affect the overall organisation. Add these new responsibilities into the workload. It is the operational change management that actually drives the change.

Make sure you have the right people with an understanding of both the IT side and the business side. Without the necessary resources and a driving advocacy, the project risks becoming just a 'pipe dream' in the organisation. That is why it is so important to define your organisation from the start.

'GETTING STARTED WITH CRM' CHECKLIST

We recommend that instead of embarking on a long process of internal inventory and gathering of business input from every area of your organisation, that you engage the relevant business and technology leaders in your company to discuss the following list as a first step.

HIGH LEVEL BUSINESS DRIVERS

- ✓ Which strategies and KPI's are the priority for the project?
- ✓ Which business areas do we expect to cover with the new solution?
- ✓ Which processes do we expect to cover?

INITIATING THE BUSINESS CASE

- ✓ Which business units should be included in the business case?
- ✓ Which of our processes should be examined in the business case?
- ✓ Who should lead the business case process?
- ✓ Who could help us determine the cost / benefit analysis

PREPARING THE ORGANISATION

- ✓ Who in our organisation should drive and implement the CRM?
- ✓ Which department / project leader will have the responsibility?
- ✓ Who are all the necessary stakeholders?
- ✓ How will our operational organisation handle the changes?
- ✓ How can we get the best internal adoption to the new solution?
- ✓ Who will be responsible for support and maintenance of the implemented solution?
- ✓ To what extent is it "DIY"?
- ✓ To what extent do we want the company to be a part of the development work?
- ✓ To what extent is the implementation national or international?
- ✓ Which software solutions do we use already?

CRM CHECK LIST

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CONCLUSION

So what does the preparation for CRM success boil down to? First get an idea (not a detailed documentation) of the value you expect to drive, develop your business case and pave the way for fruitful change within the organisation. At that point, it's only a matter of getting started.

It is with our insights, from many years experience, that we have repeatedly observed the factors that are most likely to lead our clients to achieve their goals. The companies taking implementing these tried and true strategies from the field can prepare themselves up to yield a positive return from their CRM investment.

WE ARE READY TO HELP YOU

We welcome you to reach out early in the process so that you can benefit from our experience. To assist you, we're offering a no-strings-attached session to help ensure you start on the right track. We will help you apply these insights to get started laying the foundation for your CRM initiative.

We help companies to discover new opportunities and convert them into actual business.

We do this by understanding our customers' business models and knowing the needs of the end users. This means that we are able to advise on and develop solutions, technologies and tools in a way that creates new business opportunities.

All of our solutions are built on Microsoft technology around Dynamics AX, CRM, Power BI and SharePoint.

Here's how we'll help:

1. We will review your high-level business drivers and stage the right questions so that you can identify where your business can derive the most value from a CRM solution.

2. We will help you lay the groundwork for the business case. We recommend this because most clients grow during an analysis phase with us, gaining an understanding of what the solution could deliver and what benefits could be derived will sharpen your case.

3. We will sharpen your organisation plan and help you identify key benchmarks to create a plan that works for you.

INVOLVING OUR TEAM EARLY ON ENSURES THAT PRECISE NEEDS ARE DEFINED AND THAT YOU CAN GET STARTED SEEING A RETURN FOR THE EFFORTS.

HAVE A QUESTION?

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