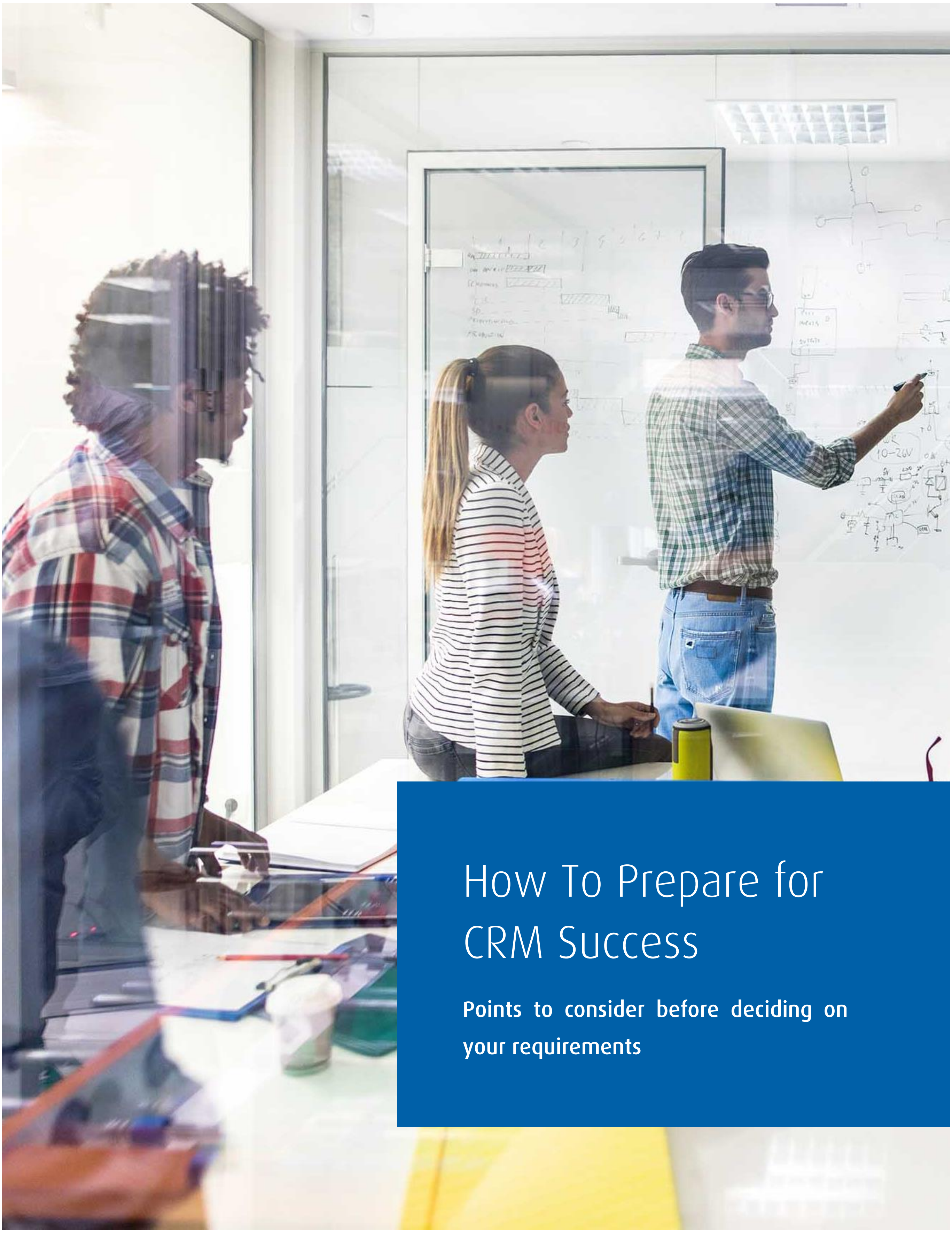

How To Prepare for CRM Success

Points to consider before deciding on your requirements

QGate

Pre-Planning Your CRM

You have decided to implement or reimplement a CRM solution.

But what do you need to consider?

How do you start?

How can you avoid common pitfalls?

The history of CRM implementations is unfortunately littered with unsuccessful implementations. But QGate can help avoid this, and it all starts with preparation.

This whitepaper was created to help and guide you through the steps required to prepare for a successful new CRM system.

Setting goals, sharpening aims, and defining SMART objectives is as important when implementing CRM as it is with any new project.

SPECIFIC MEASURABLE ACHIEVABLE REALISTIC TIMEBOUND

You need to consider what a successful implementation looks like to **YOUR business**. Break down your desire for CRM by asking yourself these questions:

WHY do we need a CRM?

What do we expect to see as **BENEFITS**?

WHO needs to access it?

What does "**GOOD**" look like?

What should the **ROI** be?

What is the **MINIMUM** benefit we expect to gain in the first instance?

These and similar questions will help you qualify that you are planning a worthwhile project. You will establish criteria that confirms the most important needs with quantifiable objectives, and you can use this to confirm success at the end of the project.

With these objectives defined, you can move on to the next important step: documenting your processes.

Part 1: Processes

Consider that you are moving to a new house instead of a new system. They say the top 3 considerations are Location, Location, Location.

With CRM, it's Processes, Processes, Processes.

A struggle of being a fast-moving business is that it's easy to lose track of how you are currently operating. In our 20 years of modelling business processes into CRM, we have found that putting a diverse group of employees into a room and asking them how their business operates will get you a surplus of conflicting answers. Each indiocarina of time juba vidual and department have their own perspective.

How can you define a set of requirements for a system if it is not clear to everyone how the business operates?

Or, more accurately, should operate.

There's a simple solution.

Look at the processes you want to implement before looking at a solution. The root cause of many CRM implementation "failures" is a lack of understanding of the business processes. Many systems are faithfully implemented to a set of requirements but without any due diligence on the underlying business processes. Many organisations do not have these defined and the implementation team do not question this.

Where do you start? There are Six key points to consider when looking at your processes:

1. Review the processes with representatives from across the business even if on the face of it a process may not affect their team
2. Start with the end in mind – define the objective of each process then work towards it
3. Look to the future, not the past – how do you WANT to run your processes going forward?
4. Think digital! Will users access information from their hand-held devices, or a portal? Could changes here improve your user or customer journey?
5. Continually challenge along the way – use the "why?" question a lot!
6. Use an external facilitator

This last point is critical and will help get the others right. We are not talking a business processing re-engineering consultant necessarily, but someone with a reasonable business understanding (NOT technical) who can:

· Ask naive, even seemingly "stupid" questions

· Offer up left field ideas

· Help you understand how the process affects others in the organisation

· Not influenced by loyalties, in house politics, historic culture, etc.

At QGate, we have these capabilities and advantages. We are detached enough to ask what an employee may deem too silly a question for them to ask. The results of this can often be very constructive for everyone. Employees are empowered to offer and discuss their own (correct or incorrect) assumptions.

Suggesting left field options can also be very helpful. These come about because the external person is not constrained by the “norm” of the existing thinking. An external facilitator of the right background should be able to add value by sharing and offering up ideas and input based on their own experience.

Using an external resource to facilitate your business process review is a highly recommended and worthwhile investment in your business.

Document your findings in visual form: this is easier to understand than long-winded text. Flow charts or swim lane diagrams are a much better option and support a “what if” check and balance approach, i.e. you can look through the flow and identify the impact of any breaks.

Once you have a process flow defined, draw a line through it at various points and ask, what happens if it breaks here?

The final step: share all the great work you’ve done across the business. Don’t hide it. Keep the processes up to date and they’ll make a great resource to train new starters or help identify further improvement.

Getting good data into CRM is often the most expensive element of any initial implementation. There are Five primary things to consider reducing the risk of data failure:

- ✓ What's your **Data Governance policy**?

  Not only from a GDPR compliance perspective.

- ✓ Where's the data coming **from**?

  What are the **data sources**, and which should be deemed as the primary/master source?

- ✓ Will there be a one-off data **migration**, or an ongoing feed?

  If so what are the considerations for ongoing **integration**?

- ✓ How **old** is the data?

  If it has not been touched for a long time, what **value** does it have now or in the near future?

- ✓ Are there any data **security** considerations?

  Should **everyone** be able to see, update, add everything/anything?

Part 2: Data

Data is the lifeblood of a CRM system. If you do not have good data, your CRM system is in big trouble from the start.

The work required to move data from one place to another is generally significantly underestimated. What looks like a simple row in a spreadsheet may have to be split into any number of tables within a CRM system.

For example, a row in a spreadsheet that holds:

Company Name	Contact Name	Address	Phone Number	Email	Last Contact Date

Would mean populating the:

Account/Company

Contact/Person,

and **Activity** tables, at the least.

Things get even trickier when a lot of information is held in one column, i.e. in the spreadsheet.

Contact Name
Mr John Alexander Doe BA Hons

This detail needs to be split into different columns so that it can be imported into the separate CRM fields:

TITLE	FIRSTNAME	MIDDLENAME	LASTNAME	SUFFIX
Mr	John	Alexander	Doe	BA Hons

This issue also often applies to a contact or account address that's been put into a single column within a spreadsheet. To sufficiently search data based on, for example, postal code, the address must be split up into separate fields.

Another challenge is the consistency of data. How many ways can a spreadsheet hold the name of a country?

USA, **United States**, **US of A**, **United States of America**, **U.S.**

Multiply the work above by the number of sources of data, each likely to have its own format, with additional data associated to it and all this impacts the time and cost of data import. Review the value of the data you'll be moving across. Your process maps should go some way to helping you prioritise what you need.

Next, there's activity history. This includes historic/pending emails, phone calls, meetings, and attachments. If this is a migration from a previous CRM system then the format of how this data is held is likely to be very different and have its own set of challenges, such as the referential links between Accounts/Companies and their associated Contacts/People, etc.

When moving from one system to another there are often data "holes". Your new system expects to have certain fields populated but the source system does not have that data. So, you must decide how to create that missing data.

A common statement at this point is, "It's OK, the data is in SQL/Server", or similar database format. However, with respect to this topic, SQL/Server is simply a more complex version of Excel. You still must consider all the points above. The good news is it's not all doom and gloom. There are several very good data migration utilities out there to help in the data migration process. Some offer out-of-the-box migration templates that can hook up the source data and move it to your shiny new CRM system. As always, weigh up what suits your timescales and budget. As most systems offer some level of customisation and some organisations have possibly misused (never!) the source system, these templates should be reviewed before you hit the button to ensure that you will get the result you expect.

Part 3: Outputs

Starting with your dream end result in mind is a good way of thinking when considering your processes. A good check and balance on both the processes and the data considerations is a list of required outputs.

When preparing for CRM, the Five key outputs to consider are:

1. What primary Metrics you are aiming to measure (keep these limited to five max.)
2. What Dashboards you'll need to display the data
3. What Documents you'll need to produce
4. What Reports you'll need to generate
5. What specific Lists of information will help your business function; e.g. the Contact lists that contain the information required to support your marketing activities

You do not, and should not, get into huge detail at this stage. It is almost impossible to define in detail every report, dashboard, or any of the other items mentioned here.

Realistically the details will work themselves out as you go live and thereafter. However, having some consideration of the sort of output you need will help to assess if your processes capture the data required to support the above.

We recommend that every system should be implemented with the aim of providing a couple of key metrics as part of the overall project objectives, i.e. Leads per Month, Opportunities closed, Cases resolved.

You should use these at a high level to assess business performance, and to some extent, your CRM's ROI.

Part 4: Priorities

Microsoft Dynamics 365 is one of the most customisable products of its kind on the market. This is both a gift and a curse. As you run through your processes you'll find brilliant new ways of working faster and smarter. Fantastic – but this can start to increase the scope of your project. This is great if you have a huge budget and/or unlimited time and resource. But, the reality check is that it will take time and money to implement, and you will have a finite budget/resource/timeframe.

You need to Prioritise!

Your agreed project Goals and Objectives, will go some way to helping you do this but having a longer-term view is always useful, so don't throw that away. Having something to aim for means that you can take more appropriate immediate term decisions that should form a strong foundation for a system. Realistically you will not have the time or budget to deliver everything at once. Planning each stage/phase of your implementation helps you manage expectations (and budget) while still getting valuable input from across the business.

The advantages of implementing a simpler initial system:

- Offers users time to acclimatise to a new way of working, thus aiding user adoption
- Allows you to focus on getting those basics right, including the right data
- Allows you to better define subsequent phases based on practical experience of the foundation you started with
- Provides a quicker ROI on a smaller investment – FDs like this!

Here are a few tips to consider when Preparing for initial phase:

- Identify the primary/critical processes you must support
- Identify what standard CRM functions you can benefit from immediately
- Determine what automation you can do without – manual processing is good to prove a new process with minimal investment
- Establish what integrations you must have - Outlook is common and out-of-the-box in most cases

These tips will help you deliver a Minimum Viable Product (MVP) with the least investment you need to make to get a worthwhile return.

Phase two or three need not be that far behind phase one but focusing on the MVP is a great way to ensure the core system is as simple and strong foundation as possible and will serve your business well going forward.

Part 5: Requirements

Now you know what you want to achieve (and the processes/data required to do so) you're in a great position to draft your Requirements.

Depending on your planned approach to procuring a system and potentially selecting a partner or putting a team together to implement, ensure you share the information and background created from:

1. Your Project Objectives; Goals
2. Process mapping
3. Looking at the data required
4. Deciding the Outputs you require
5. Assessing your priorities

Sharing the thinking behind your requirements really helps whoever is to implement the system to assess how best to design a solution for you. They should be asking a lot of "why" questions, and the background will help to provide some answers.

Set up meetings so that all parties can further clarify elements or discuss options before a final proposal. This helps both parties work towards a functionally satisfactory and cost acceptable solution more effectively.

Even if you have good technical knowledge of your intended solution, try not to make too many product-specific requirements.

Technology moves at such a pace that there's always new, sometimes more cost/time effective ways of achieving your goals. Work with your partner/ implementation team to decide the best way forward for your business now and in the near future. Being too prescriptive can lead to a less than optimal system.

Conclusion

CRM preparation is only one part of implementing your new CRM solution. QGate has designed and built the CRM Success Program – a methodology and materials set that guide you through all the steps required to succeed.

We recommend that your next step is to see if you are ready for CRM by filling out our Readiness Assessment. This survey guides you through all the areas you need to consider (and offers tools to help) before scoping your project and highlights any areas that you should focus on to be fully prepared and avoid backtracking and pitfalls.

We are happy to walk you through this assessment if you would like us to – just get in touch.

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