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Chapter 1 : The CRM implementation process: a six step plan for success

It is more important than ever to develop CRM strategies that help, not hinder, the planning and implementation of CRM technology. Porter's tests serve as a framework for executing a step-by-step customer relationship strategy before embarking on CRM planning and implementation.

When it comes to CRM the strategy is often the difference between failure and success. But how do you develop that strategy? What support will you need? Here are our 11 essential steps for developing a bullet-proof CRM plan: Ongoing cooperation and acceptance will be crucial to ensure success. Use these resources to build a project team who will shape your strategy and define its goals. A recommended CRM project team will include an executive sponsor, a project manager, a CRM administrator and key users for each team. What will CRM success look like? Set high level goals that will be your benchmark for the project before determining how your key success metrics will be measured. Creating a complete view of each client relationship in a single application Improving the quality of Developing more efficient business processes Increasing lead generation Improving account retention and service delivery 3 â€" Prioritise your CRM Goals Rather than attempting to tackle all of your CRM goals in a big bang single implementation we recommend a phased approach that focuses on quick wins. We recommend mapping out the flow of each step in your current processes to help define how they will be managed in CRM. This presents a superb opportunity to gain clarity on how well your processes are currently working and identify how CRM can improve their efficiency, often by removing duplication of effort and applying greater process automation. A will provide a wealth of expertise to help you re-engineer your processes by utilizing CRM functions to improve their efficiency and achieve your goals. For example, you may be taking a phased approach by leading with an initial CRM sales team deployment so consider what fields will need to be tracked on your records for accounts, contacts, opportunities and leads. To ensure your readiness consider these points: What data needs to be imported into CRM? Where is it currently stored? How good is the data quality? Does it need cleansing? How far back do you want to go with relationship history data? What duplicate matching rules need to be set? What direction will the data flow? If one of your goals is to create a single view of each relationship, integrating CRM with an external data source is likely to be a high priority. As well as feeding data from other applications, CRM will also push data to other sources, for example to create a new order in the back-office ERP system when a CRM sales opportunity is converted. For example, do you want every CRM user to export data to Excel? Flexible CRM solutions like enable advanced user permissions which can include team and territory management to precisely control which records users are entitled to access and what controls they can use. Successful CRM projects engage with multiple users at an early stage to consult for ideas and stimulate interest in CRM. Visible board level commitment for CRM is a crucial step but often project managers neglect to listen to user needs and fail to build support from the ground up resulting in challenging user adoption barriers to overcome. Technology like Microsoft Dynamics is an amazing enabler but without user adoption, understanding and support, even the greatest system in the world will struggle to deliver the expected results. To develop an effective.

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Chapter 2 : The 11 Step Plan for CRM Success - CRM Software Blog | Dynamics

A successful CRM implementation process is one of the hardest tasks that modern businesses face. Finding and implementing a CRM which provides people in the organization with the information they need at the right time is difficult.

Planning and deploying Dynamics on-premises: This document contains the following guides. Planning on-premises Dynamics This guide gives you information that helps you get your organization ready for Microsoft Dynamics on-premises. It includes two main aspects of planning for a customer engagement system: These topics focus on areas such as the supported topologies, system requirements, and technical considerations to address before you install. These topics cover the business management, requirements, and project management aspects that are needed when you deploy a customer engagement system. Installing on-premises Dynamics This guide provides the information that you need to install Microsoft Dynamics applications, such as step-by-step instructions for running Setup, and command-line instructions for silent installations. Operating on-premises Dynamics This guide gives you information about how to back up, restore, and provide data recovery for Microsoft Dynamics Additionally, this guide provides operational procedures and troubleshooting steps for known issues. Administration Guide for Dynamics This Word document contains resources and topics designed to help you manage, configure, and implement customizations of Microsoft Dynamics on-premises and Microsoft Dynamics online deployments. Reporting Guide for Dynamics This Word document covers how to author custom reports for use with Microsoft Dynamics This format works well to view on a standard computer screen, but we suggest using this format for viewing on other devices such as tablets, ereaders, and mobile phones. To start the download, click Download. If the File Download dialog box appears, do one of the following: To start the download immediately, click Open. To copy the download to your computer to view later, click Save. Important We optimize for online publishing. Extract the files into a folder on your local computer. If prompted, clear the "Always ask before opening this file" check box. Clear This file came from another computer and may be unsafe, and then click OK. Click Unblock, and then click OK.

Chapter 3 : 5 Keys to Preparing for Your CRM System Implementation â€“ NTEN

The success of a Dynamics implementation project largely depends on the amount of planning and strategy that goes into the implementation. However, if things aren't going well after it is launched, the principles of planning can still be applied to turn the implementation around.

Broadly speaking, you need advocates, specialists and workhorses to make your implementation team a successful one. The advocates are normally senior in the organization and can articulate why the change is happening, there is almost always resistance, so these advocates should be able to sell the idea to the workforce. If the process goes down this path, it can be fatal. Advocates are therefore essential as the first step in convincing people in the organization that the new CRM will make their lives better. The planning process is normally carried out by specialists in the team. These people have a good understanding of the CRM being implemented and work at the start to make sure that the system is set up correctly and that the data migrates. If there is no in-house specialist consider hiring one for the project. The vendor can be helpful, but ideally you want someone inside your organization for the roll-out period. Finally, workhorses are necessary, and they come in a few different guises. There are workhorses who make sure the guidance of the specialist is followed testing, migration and there are workhorses who line manage new users post Implementation to make sure they are using the system effectively. Again this process will be different for every organization, but some well-worn steps help to smooth the transition: Assess the strengths and weaknesses of your CRM implementation team Going on from the first point you need to work out which advocates, specialists and workhorses you have in-house to make the change a reality. Write out exactly what you need, the gaps you have in expertise and how you plan to fill those gaps. When assessing the team also consider the capabilities of the current users to move to a new system, are they tech savvy? Is the current system firmly embedded in company culture? User training and engagement Testing Go-live You should also look at how you will track the project. Whatever the model is be consistent and have regular check-ins. Communicate the change to stakeholders This is an essential step. Ultimately, you should aim to Give staff clarity on why you are implementing a new CRM Give staff an opportunity to provide thoughts and feedback, and Give staff time to adjust to the change Clarity should be achievable although often this is delivered abysmally. You should aim to make sure that every member of staff has a clear view of what is happening, why it is happening and how it affect will their work life. The opportunity to provide feedback is more difficult. You want to make people feel heard, but if you already have a set idea, then the illusion of having input can be more detrimental than helpful. This filter often stops the flood of comments, and one person is easier to work with that a whole staff body. Making sure that the roll out happens over a sensible period is important. It makes staff feel respected if they understand the process longer in advance, gives them a chance to process what is happening and ask questions. If the CRM implementation process is rolled out too soon it can cause panic. Forecast a CRM implementation budget The cost of getting this wrong can be very high. From paying too much for software to wasted staff hours to adding bespoke features you can easily overspend. Plan for everything, including reduced productivity during the go-live period. Review the payoff Have a clear view of the benefits of new software and try to quantify this. Conduct a risk assessment Take a look at what can go wrong. These risks can be different but once you know what they are you can manage them. One company may have a technical risk, i. The risk assessment will help you develop a realistic budget. Begin rolling out your CRM A successful CRM roll-out is a broad topic in itself â€” the main question to consider is whether it is fit for purpose. As you consider messaging, training, speed, data migration and try to assess the impact, this should be filtered through that question. Most organizations under-plan or plan in the wrong areas. For example, most organizations know that training is important so deliver some generic staff training days to get the key points across. It is much more effective to train the line managers of the most substantial users in more depth so they can pass on the knowledge as the CRM rolls out to their teams. Another tactic that works well is giving line managers training on how to get ideas across to different types of learners and then working out how each user learns best. A migration brief should cover what you need to migrate and how it will be used in the new CRM. Once you have the high-level brief you can begin to work out how to do this. Downloading and uploading using Excel or csv are still the most popular tactics but often fall short of getting to the final result. Manipulating the data once it has been uploaded can be challenging, as often the new CRM is using the data in a very different way. Most CRMs will have apps to provide support - but the level of customization may mean the process is manual. Before migrating, it is a good idea to cleanse your data of any out-of-date information defunct contact addresses, old employee information etc. CRM user training This can be delivered in different ways. The most successful training tends to be a mix of face-to-face, online, practice and having managers who can support their team. In my experience getting teams out of the office for a day is very important. Not only does it give trainees the mental space it sends out the right message - that the training is important! Consult with them and schedule in time pre go-live for:

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Chapter 4 : Download Microsoft Dynamics CRM Implementation Guide from Official Microsoft Download C

Customer Relationship Management Implementation. Best Practice #1 - Evaluate Business Expectations & Needs. Prior to using a CRM system, as a business, you must take stock of your IT infrastructure, define succinct objectives and identify department needs.

Planning is the key to success. The results, if you plan well, are well worth the effort. Fundamentally, implementing a CRM system means using a single database to manage all of your relationships with your constituents â€" from donors and volunteers to colleagues. Before you get started with your CRM system implementation, you should ensure that your objectives for implementing it are in sync with the key benefits of CRM. If not, it might not be the right time for you to implement a CRM system. The key benefits include: Consolidating to as few systems as possible so your IT team has fewer systems to manage and your team has fewer systems to be trained on. Reflecting all data in a single system so data maintenance is easier and you have easy access to more accurate reporting. Which is more important: The technology or the plan? Despite what you might think, successfully implementing a CRM system depends less on the actual technology you choose than on figuring out a few things from the outset. Then, think tactically about your constituent groups and what you are doing with each of those groups. This helps you define what information needs to be stored in your CRM system and what types of processes you need to carry out â€" such as list management, communications and program tracking â€" within the system. Tried-and-true tips for planning your CRM implementation You thought you were ready to implement your CRM system, but there are even more considerations. Here are five quick tips to consider before you get started: Take time for discovery. Take time to assess your priorities and what you have in place now: Catalogue your various software systems, databases and spreadsheets, and determine what data is stored in those systems â€" from names and addresses to donor history â€" so you know what information needs to be moved into your new system. Determine the high-priority processes to address in your initial CRM system implementation. Keep in mind that you have finite staff resources across the organization, and everyone has a day-to-day job to do. Be sure to take into consideration the timing of active fundraising seasons and large program activities, and try to avoid heavy CRM implementation work during those times. Take a phased approach. It has taken years for your organization to collect its data and develop its many processes. Likewise, it will take time to represent those data and processes in a single system. Break your implementation into phases to make the project more manageable. Start with your core processes first. Get started with the processesthat are most representative of your organization and how it works. The entire organization needs to be part of the process. Be sure to get all of the stakeholders across your organization involved in the planning process, and keep the entire organization updated on the CRM implementation as it progresses. This, in turn, helps to ensure your organization sees all of the benefits of implementing the CRM system. Enter your details to sign up for NTEN updates.

Chapter 5 : How much CRM costs and how to set your budget

Once we decided to move forward with CRM and before we even launched the pilot at the construction equipment rental company, I spent a great deal of time at every sales and management meeting â€" whatever the level â€" to talk about what was coming.

Staff overtime during implementation Opportunity cost We advise looking at the whole process from vendor selection to a full implementation program when allocating a budget. Custom CRM development can be a good idea if you know exactly what you need; this can be a good option even for small businesses 2. Revenue impact This is very hard to determine, but you must try and quantify this. The overarching question is: The ways to measure this accurately are varied and deciding which method to use is context dependent. Revenue per user, customer acquisition cost or conversion rate are probably getting closer to how you can track progress. So, for example, a sales CRM that allows you to increase outreach volume and outreach channels is simpler, as you can look at the revenue with the new system versus the old. You should start with a hypothesis â€" x action is improved by the CRM and will result in y. To do this, some baseline data is important. Cost impact This is similar to revenue in that you need to predict potential cost savings the CRM will deliver. These can be varied: You need to try and quantify what the cost saving will be, benchmark the current costs, have a process for reviewing costs and a metric to tie the cost-saving to the new CRM. They implemented a CRM which had improved analytics from their old CRM; this meant reports were automatic rather than manual and they could calculate the hours and the costs saved. So if saving time and subsequently cost is a key driver users should think about how the saved time will be spent. However difficult to quantify organizations should aim to look at an ROI from a cash perspective over a period, typically three to five years. Graph showing cash flow benefits of well planned CRM implementation, courtesy of Steve Schultz, Quaero Other considerations Alongside the cash flows there are many other justification metrics where it is so opaque to infer a cost that perhaps the metric is something else. It may be staff morale that will be affected by using the old CRM; a new CRM may help culture, it may allow for greater collaboration or structure the business information for an acquisition. They had a clear view of how the data needed to be stored and a new CRM was an essential improvement to ensure the acquisition went ahead. So the outcome was binary. Meanwhile, a third of respondents planned to increase their spending on cloud solutions in the next 12 months. The advantages of cloud CRM are well known: Storing in the cloud does handover control to a third party, which can cause issues with: From the cloud, this can be more difficult than if the data is stored locally. In practice, all but the largest most tech-heavy companies store information in the cloud but on-premises solutions can work if you need more control or the data is especially sensitive. The implications for budget can be dramatic. An on-premises solution will carry a much higher upfront investment for servers and setup. Setting up a cloud-based CRM is less capital intensive but, of course, you are tied into making payments on a regular basis. Cloud CRM has a much lower upfront costs - but over time monthly fees add up. The decision for on-premise vs cloud is often more about feature set than budget but a clear costing can go a long way to helping you make a decision. It is a good discipline to try and distil it into one sentence. Here are a couple of examples: The CRM will allow us to match customers with offers more efficiently and this will help us improve our customer lifetime value. The CRM will help our sales team save two hours a day which will allow them to do more prospecting and increase user acquisition and sales. Of course, a CRM may achieve results in more than one area, but the exercise will help you think about the broad purpose. From here this can be broken down into quantifiable goals and then finally onto features. You can list and prioritize your CRM needs with our comprehensive CRM requirements template Below is some guidance on how to make decisions over certain features and how they can affect your budget. When making this decision, you should consider fitness for purpose; some systems are necessarily complex, but it should be as simple as possible. It is almost certain that you will want to make changes after the initial setup and if this is difficult it will be a big cost down the line. Obviously the more flexibility, the better, and an easy-to-integrate CRM will cut down on customization costs considerably When tying this decision to budget you will likely be weighing up functionality vs cost. If you need to customize the setup of the CRM this is likely to add to the budget, especially if you need to buy in this expertise. For example, for a feature which is desirable and easy to add later but expensive it makes sense to run the CRM without it at the start to reduce the budget. You should assume that you will need to add other features so leaving budget for this is important. Doug Haines About the authorâ€¦ Doug Haines has worked on a variety of CRM implementation projects and now writes on a wide range of topics.