WCS CRM Consultancy

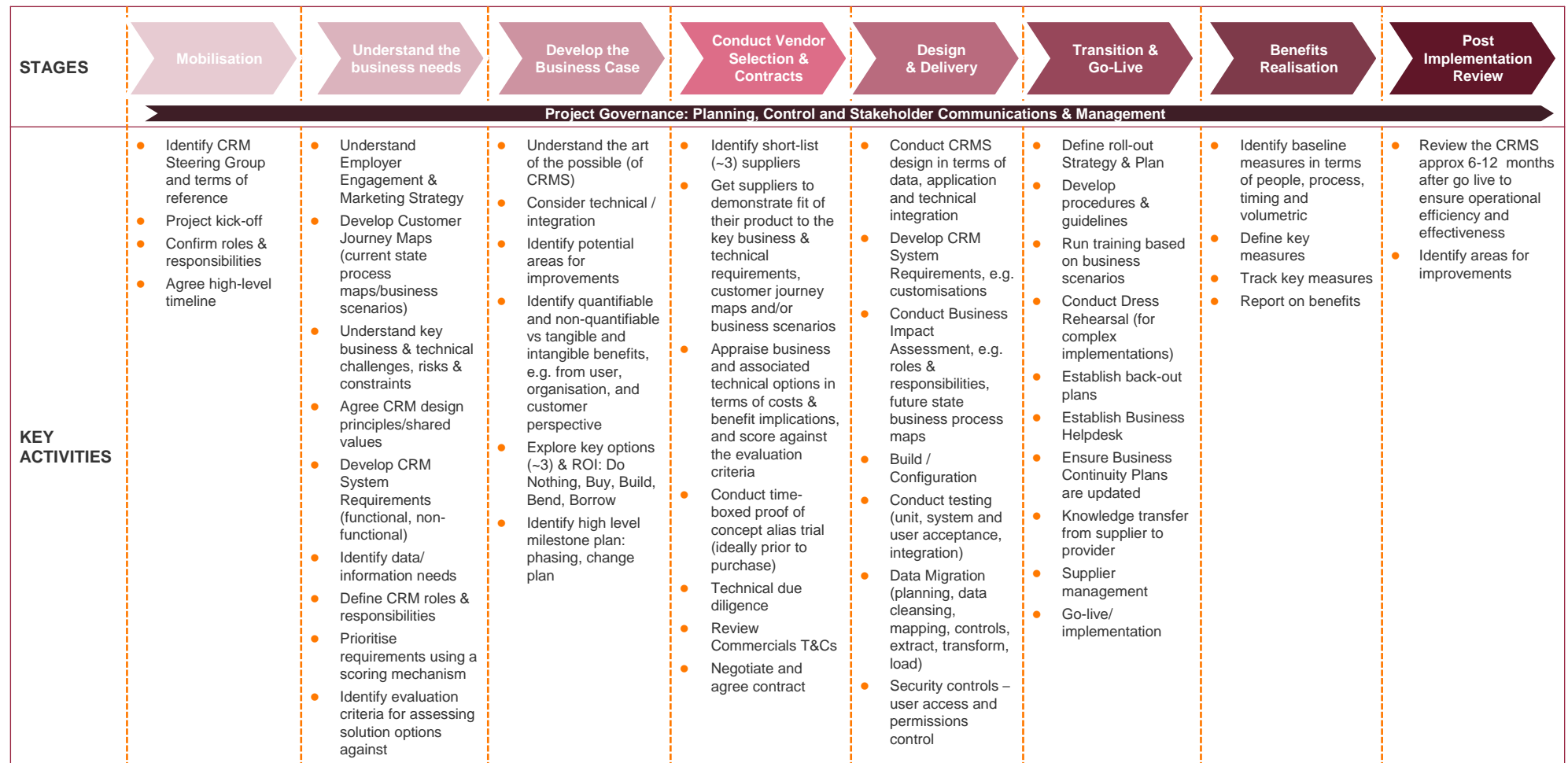High-Level CRM Implementation Planning Guidance

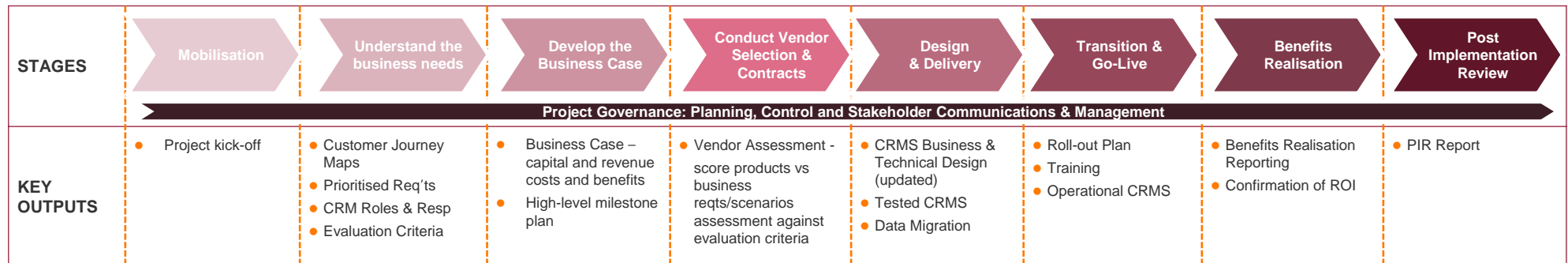# High-Level CRM Implementation Planning Guidance

This document is intended to provide an overview for discussion on CRM implementation as part of the World Class Skills programme consultancy support.

It is intended to be used as an illustrative example for providers to support strategy and supporting system development discussions.
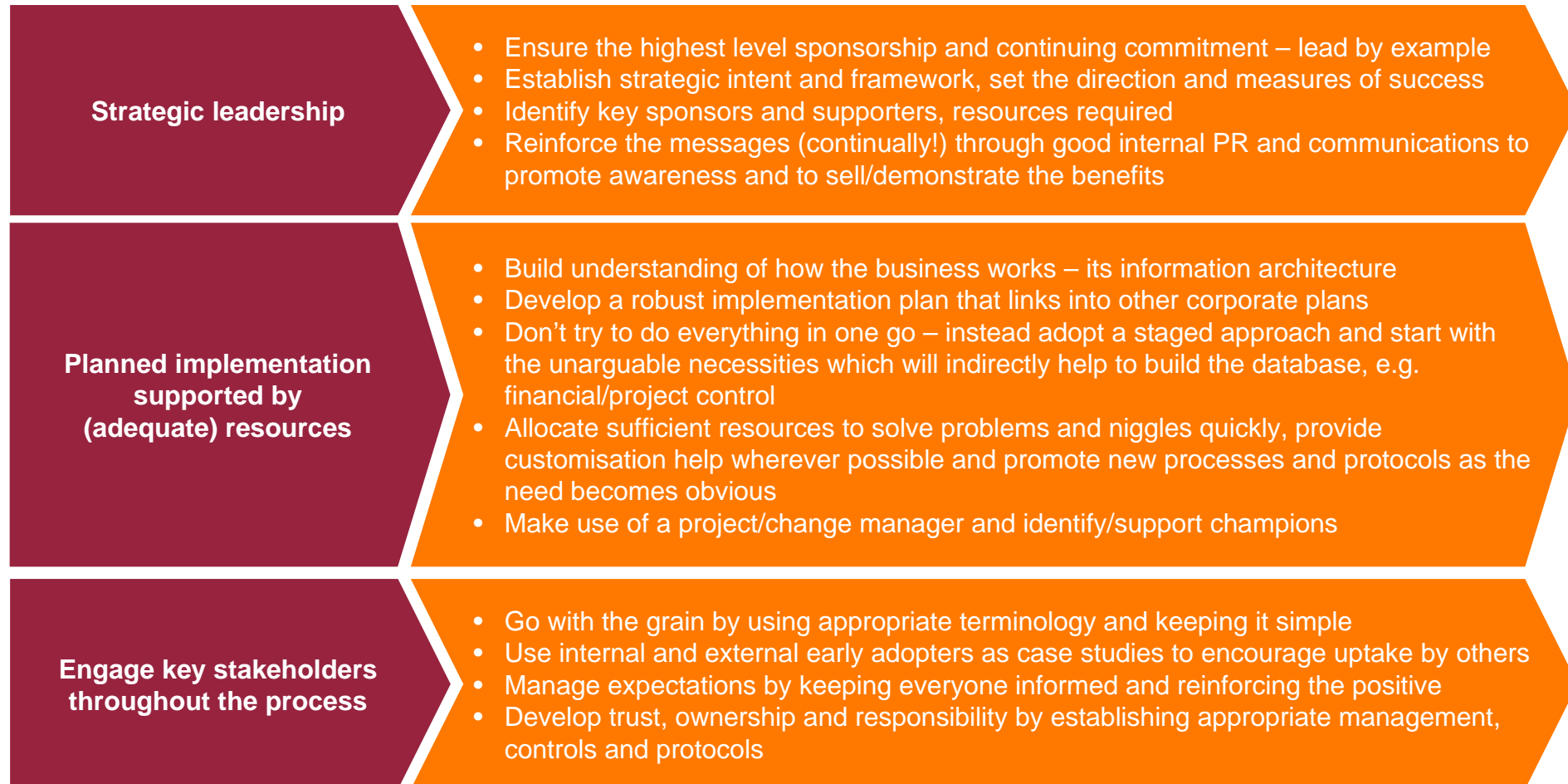
A typical CRMS implementation project lifecycle

STAGES	Mobilisation	Understand the business needs	Develop the Business Case	Conduct Vendor Selection & Contracts	Design & Delivery	Transition & Go-Live	Benefits Realisation	Post Implementation Review
	Project Governance: Planning, Control and Stakeholder Communications & Management							
KEY ACTIVITIES	• Identify CRM Steering Group and terms of reference • Project kick-off • Confirm roles & responsibilities • Agree high-level timeline	• Understand Employer Engagement & Marketing Strategy • Develop Customer Journey Maps (current state process maps/business scenarios) • Understand key business & technical challenges, risks & constraints • Agree CRM design principles/shared values • Develop CRM System Requirements (functional, non-functional) • Identify data/ information needs • Define CRM roles & responsibilities • Prioritise requirements using a scoring mechanism • Identify evaluation criteria for assessing solution options against	• Understand the art of the possible (of CRMS) • Consider technical / integration • Identify potential areas for improvements • Identify quantifiable and non-quantifiable vs tangible and intangible benefits, e.g. from user, organisation, and customer perspective • Explore key options (~3) & ROI: Do Nothing, Buy, Build, Bend, Borrow • Identify high level milestone plan: phasing, change plan	• Identify short-list (~3) suppliers • Get suppliers to demonstrate fit of their product to the key business & technical requirements, customer journey maps and/or business scenarios • Appraise business and associated technical options in terms of costs & benefit implications, and score against the evaluation criteria • Conduct time-boxed proof of concept alias trial (ideally prior to purchase) • Technical due diligence • Review Commercials T&Cs • Negotiate and agree contract	• Conduct CRMS design in terms of data, application and technical integration • Develop CRM System Requirements, e.g. customisations • Conduct Business Impact Assessment, e.g. roles & responsibilities, future state business process maps • Build / Configuration • Conduct testing (unit, system and user acceptance, integration) • Data Migration (planning, data cleansing, mapping, controls, extract, transform, load) • Security controls – user access and permissions control	• Define roll-out Strategy & Plan • Develop procedures & guidelines • Run training based on business scenarios • Conduct Dress Rehearsal (for complex implementations) • Establish back-out plans • Establish Business Helpdesk • Ensure Business Continuity Plans are updated • Knowledge transfer from supplier to provider • Supplier management • Go-live/ implementation	• Identify baseline measures in terms of people, process, timing and volumetric • Define key measures • Track key measures • Report on benefits	• Review the CRMS approx 6-12 months after go live to ensure operational efficiency and effectiveness • Identify areas for improvements

A typical CRMS implementation project lifecycle (continued)

STAGES	Mobilisation	Understand the business needs	Develop the Business Case	Conduct Vendor Selection & Contracts	Design & Delivery	Transition & Go-Live	Benefits Realisation	Post Implementation Review
				Project Governance: Planning, Control and Stakeholder Communications & Management				
KEY OUTPUTS	• Project kick-off	• Customer Journey Maps • Prioritised Req'ts • CRM Roles & Resp • Evaluation Criteria	• Business Case – capital and revenue costs and benefits • High-level milestone plan	• Vendor Assessment - score products vs business reqts/scenarios assessment against evaluation criteria	• CRMS Business & Technical Design (updated) • Tested CRMS • Data Migration	• Roll-out Plan • Training • Operational CRMS	• Benefits Realisation Reporting • Confirmation of ROI	• PIR Report

The scope of the project will vary by the Provider's appetite for CRM change and starting point.
CRM projects can be improved through: adopting an iterative and effective change management approach, delivering towards well-defined CRM critical success factors, and having robust project governance & control in-place
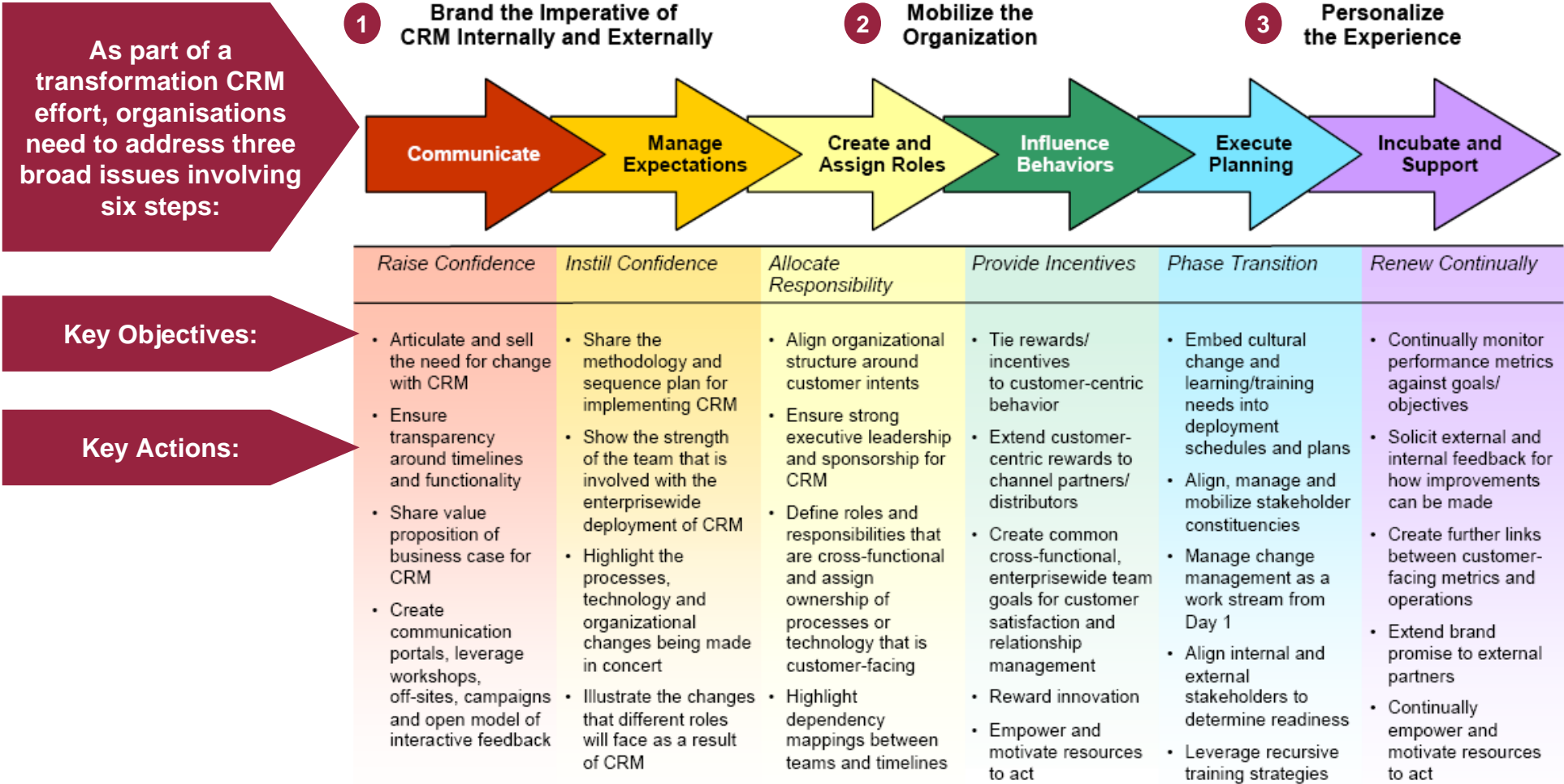
Six critical success factors for a CRMS implementation

Strategic leadership

- Ensure the highest level sponsorship and continuing commitment – lead by example
- Establish strategic intent and framework, set the direction and measures of success
- Identify key sponsors and supporters, resources required
- Reinforce the messages (continually!) through good internal PR and communications to promote awareness and to sell/demonstrate the benefits

Planned implementation supported by (adequate) resources

- Build understanding of how the business works – its information architecture
- Develop a robust implementation plan that links into other corporate plans
- Don't try to do everything in one go – instead adopt a staged approach and start with the unarguable necessities which will indirectly help to build the database, e.g. financial/project control
- Allocate sufficient resources to solve problems and niggles quickly, provide customisation help wherever possible and promote new processes and protocols as the need becomes obvious
- Make use of a project/change manager and identify/support champions

Engage key stakeholders throughout the process

- Go with the grain by using appropriate terminology and keeping it simple
- Use internal and external early adopters as case studies to encourage uptake by others
- Manage expectations by keeping everyone informed and reinforcing the positive
- Develop trust, ownership and responsibility by establishing appropriate management, controls and protocols

Six critical success factors for a CRMS implementation (continued)

Provide incentives and support	• Use intrinsic and extrinsic incentives and/or make demands of staff that require use of the system • Provide (timely!) staff development • Define the FE offer and benefits to be gained to customers/employers
Engage with suppliers early to understand functions and features	• Work closely with suppliers before purchase to understand clearly what products can do and how they relate to the needs • Ensure the product is user friendly and flexible enough to be tailored for range of interests and users
Getting as much quality data as possible into the system	• Provide data input/cleaning support resources • Force legacy systems out • Work towards integration with the institution's core business and other systems.

Gartner's CRM Change Management Model

As part of a transformation CRM effort, organisations need to address three broad issues involving six steps:

1 Brand the Imperative of CRM Internally and Externally

2 Mobilize the Organization

3 Personalize the Experience

Communicate	Manage Expectations	Create and Assign Roles	Influence Behaviors	Execute Planning	Incubate and Support
Raise Confidence	*Instill Confidence*	*Allocate Responsibility*	*Provide Incentives*	*Phase Transition*	*Renew Continually*

Key Objectives:

Key Actions:

Communicate	Manage Expectations	Create and Assign Roles	Influence Behaviors	Execute Planning	Incubate and Support
• Articulate and sell the need for change with CRM • Ensure transparency around timelines and functionality • Share value proposition of business case for CRM • Create communication portals, leverage workshops, off-sites, campaigns and open model of interactive feedback	• Share the methodology and sequence plan for implementing CRM • Show the strength of the team that is involved with the enterprisewide deployment of CRM • Highlight the processes, technology and organizational changes being made in concert • Illustrate the changes that different roles will face as a result of CRM	• Align organizational structure around customer intents • Ensure strong executive leadership and sponsorship for CRM • Define roles and responsibilities that are cross-functional and assign ownership of processes or technology that is customer-facing • Highlight dependency mappings between teams and timelines	• Tie rewards/ incentives to customer-centric behavior • Extend customer-centric rewards to channel partners/ distributors • Create common cross-functional, enterprisewide team goals for customer satisfaction and relationship management • Reward innovation • Empower and motivate resources to act	• Embed cultural change and learning/training needs into deployment schedules and plans • Align, manage and mobilize stakeholder constituencies • Manage change management as a work stream from Day 1 • Align internal and external stakeholders to determine readiness • Leverage recursive training strategies	• Continually monitor performance metrics against goals/ objectives • Solicit external and internal feedback for how improvements can be made • Create further links between customer-facing metrics and operations • Extend brand promise to external partners • Continually empower and motivate resources to act

Source: Gartner (December 2007)

Indicative CRMS implementation planning covering the initial phase

Stage	Summary of key activities ◆ go/no go decision	Month / Resource	1	2	3	4	5	6	7	8	9	10	11	12
Direction & Oversight	Develop employer journey maps across all Provider business areas involved in employer engagement, e.g. key processes, sub-processes, who is involved, decision points, sequence of activities, data stores, customer experience, hot spots, etc.	BDU	▬											
	Develop detailed & prioritised CRM Systems Requirements, e.g. sales, marketing, customer servicing, evaluation/feedback, reporting, data fields, reference data/pick-lists, screen/report customisations (see high-level CRMS requirements catalogue)	BDU	▪											
	Develop detailed & prioritised technical requirements, e.g. infrastructure, service availability and scalability, remote & mobile, local and wide area network, user roles and profiles	MIS	▪											
	Confirm alignment between Employer Engagement Strategy, Marketing Strategy, Employer Journey Mapping and CRM System Requirements		◆											
	Review and update existing Business Case, e.g. quantitative and qualitative vs tangible and in-tangible benefits	BDU	▬	◆										
Delivery	Conduct vendor selection, e.g. long-list, short-list, vendor presentations/demos, product evaluation, due diligence (hardware, network, supplier, etc), contract negotiation, etc.	BDU & MIS	▬	◆										
	Conduct a proof of concept (prior to procurement?)	BDU & Supplier	▬											
	Review & refine business design, e.g. CRM Design Principles/Shared Values, SLA, functionality phasing, future process maps, key user roles & responsibility, templates, reporting, business rules (alerts, contact history, quotes), data format and standards, terminology, screens/reports configuration	BDU & Supplier		▬										
	Review & refine technical design, e.g. integration with Outlook, technical architecture (dev, test and/or production environments), service availability and scalability, remote & mobile, local and wide area network, user roles and profiles	MIS & Supplier		▬ ◆										
	Make changes to CRMS, e.g. functionality/screens, reports, reference data, templates set-up, etc.	MIS & Supplier			▬									
	Conduct System and Integration Testing	MIS & Supplier			▬									
	Develop business scenarios (e.g. day in the life of …) and conduct user acceptance testing	BDU			▬	◆								
	Review current data quality, define data cleansing business rules, and conduct data cleansing exercise	BDU & MIS	▬	▬	▬									

Stage	Summary of key activities	Month Resource	1	2	3	4	5	6	7	8	9	10	11	12
Uptake & Usage	Identify business and technical training needs, agree training strategy, develop training material	BDU & MIS		▬	▬	▬								
	Conduct business readiness, e.g. deliver training, implement org design changes (people, process & technology), helpdesk support, document procedures and issue simple user guide manual & reference cards, etc.	BDU		▬	▬	▬	◆							
	Conduct technical readiness, e.g. infrastructure configuration, service delivery support, update DR plans, reporting dashboards, data migrations, etc	MIS		▬	▬	▬	▬							
	Conduct knowledge transfer from supplier/contractors, e.g. understand CRMS database structure and then start to develop end-user reports/MI	BDU or MIS			▬	▬	▬							
	Develop a rollout strategy, e.g. functionality phasing, user(s) take-on	BDU			▬	▬	▬							
	Start CRM System roll-out (go-live)	BDU & MIS					◆							
	Conduct Post Implementation Review	BDU & MIS								◆				
Governance	Establish Project Mgt & Control: Identify Project Sponsor, Confirm Project Board members (Chair, core members, MIS, curriculum, non-core members) Project Manager, CRM Manager, CRMS supplier support Produce regular Progress Reports, Risks & Issues Log, Agree Project Charter (the project term of reference), Change Mgt procedures (Sign-off Process)	BDU or External	▬◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
	Conduct Benefits Realisation: baseline existing data, track, monitor and respond	BDU	▬◆	▬									◆	
	Conduct Stakeholder and Communications Mgt, e.g. regular comms, share benefits of CRM with potential users, gain buy-in	BDU	▬	▬	▬	▬	▬	▬	▬	▬	▬	▬	▬	
	Establish design authority for all business and technical decision making	BDU	▬	▬	▬	▬								