

18 Ways to Supercharge your CRM Strategy

Reduce the risk of your CRM roll-out failing by applying essential technical of business analysis, change management and project management.

Find out how to Enthuse – Engage – Empower People to Embed a System with our 18 key actions.

These key actions are taken from our 3-month CRM Strategy Course which covers the key principles: business analysis, change management and agile project management disciplines.

Economic Change CIC specialises in empowering and supporting non-profits with their Salesforce CRM digital transformation.

Contact us!

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EMPOWERING NONPROFITS

18 Actions to Boost Your CRM Strategy

Project Management

How to manage your CRM Strategy

1. Decide on a project management tool
2. Create a project management plan
3. Adopt an Agile or Waterfall project management methodology

Senior Engagement

How to enthuse Senior Managers to buy-in

4. Share relevant case studies
5. Identify departmental SMART goals and needs
6. Deliver a relevant technical demo

Executive Sponsorship

How to enthuse Exec Sponsors to invest

7. Find an executive sponsor
8. Create a business case for the CRM Strategy
9. Set SMART measures of success – financial or other

Business Analysis

Empower your stakeholders to redesign the way they work

10. Invest in a process mapping tool
11. Deploy a range of elicitation techniques
12. Document requirements and solutions

Change Management

Empower people through change

13. Create a change management and communication strategy
14. Recruit an internal project champion team
15. Create a learning strategy to support different personalities and styles of learning

Data Integrity

How to embed the use of the system



16. Create and disseminate clear business rules on what data needs to go into the system
17. Decide on what good data quality look likes and who polices this.
18. Decide on what good user adoption look like and who polices this

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