LAVABOX™

How to pull off a CRM project, step by step

A guide for aspirational businesses

Is this your story?

Your business (or the company you work for) started out with a small group of committed founders and employees. The market liked what you delivered and your business grew. So you hired more people. Those people brought their own skills, experiences and habits. The common understanding of “the way we do things here” became diluted and harder to communicate with every hire.

Your quality started slipping as you tried to scale up. Enquiries slipped through the cracks. Customer conversations got lost. Delivery standards dipped. You lost confidence in your ability to grow while continuing to deliver the quality and customer experience that made you great in the first place.

CRM was supposed to be the answer

You saw the marketing videos, watched the demos, signed up for the trials and were sold on the vision: CRM can transform your business. Maybe you tried to implement CRM and fell flat - it didn’t get used and it became an expensive cloud-rolodex. Or you put it off because you weren’t sure how to make it work for your business. Either way, this guide is for you.

CRM can transform your business (if you do these three things):

For businesses without experience delivering complex IT projects, pulling off a CRM implementation can appear intimidating and risky. The good news is there's a proven framework:

1. Back the right CRM platform
2. Design the system to empower your team
3. Commit to continuous improvement

We've arranged this guide into these three sections. Within each, you'll find actionable guidance to get you from where you are now, to a well-designed system that empowers your team, influences your customers and gives you a solid foundation to scale up with confidence. We hope this guide gives you a clear way forward to get CRM working in your business.

About the author

Justin Lanigan is the Managing Director of LavaBox, a CRM & Marketing Automation consultancy based in Auckland, New Zealand. LavaBox works with aspirational Small and Medium Enterprises (SMEs) to transform the way they find, convert and keep customers in the digital age.

In 2007, he began his first business, 123 Online with his good friend and LavaBox co-founder, John McLean. The company still runs today, and has delivered over 2,000 websites and digital marketing projects using a highly-systemised sales, marketing and production process built on the Salesforce CRM platform.

After experiencing the transformation that occurs when effective digital marketing and CRM technology come into contact with well-crafted business processes, John and Justin founded LavaBox to help other growing businesses harness the power of CRM. LavaBox have experience successfully implementing CRM systems across a diverse range of industries including financial and professional services, manufacturing, retail, construction, software, healthcare and not-for-profit.

Although LavaBox are Salesforce CRM specialists, the information provided in this guide can be applied to any CRM project, regardless of the platform you choose to work with.

If you would like to explore ways LavaBox can partner with you on your CRM journey, we'd welcome the opportunity to learn more about your business challenges and work with you to design the right solution.

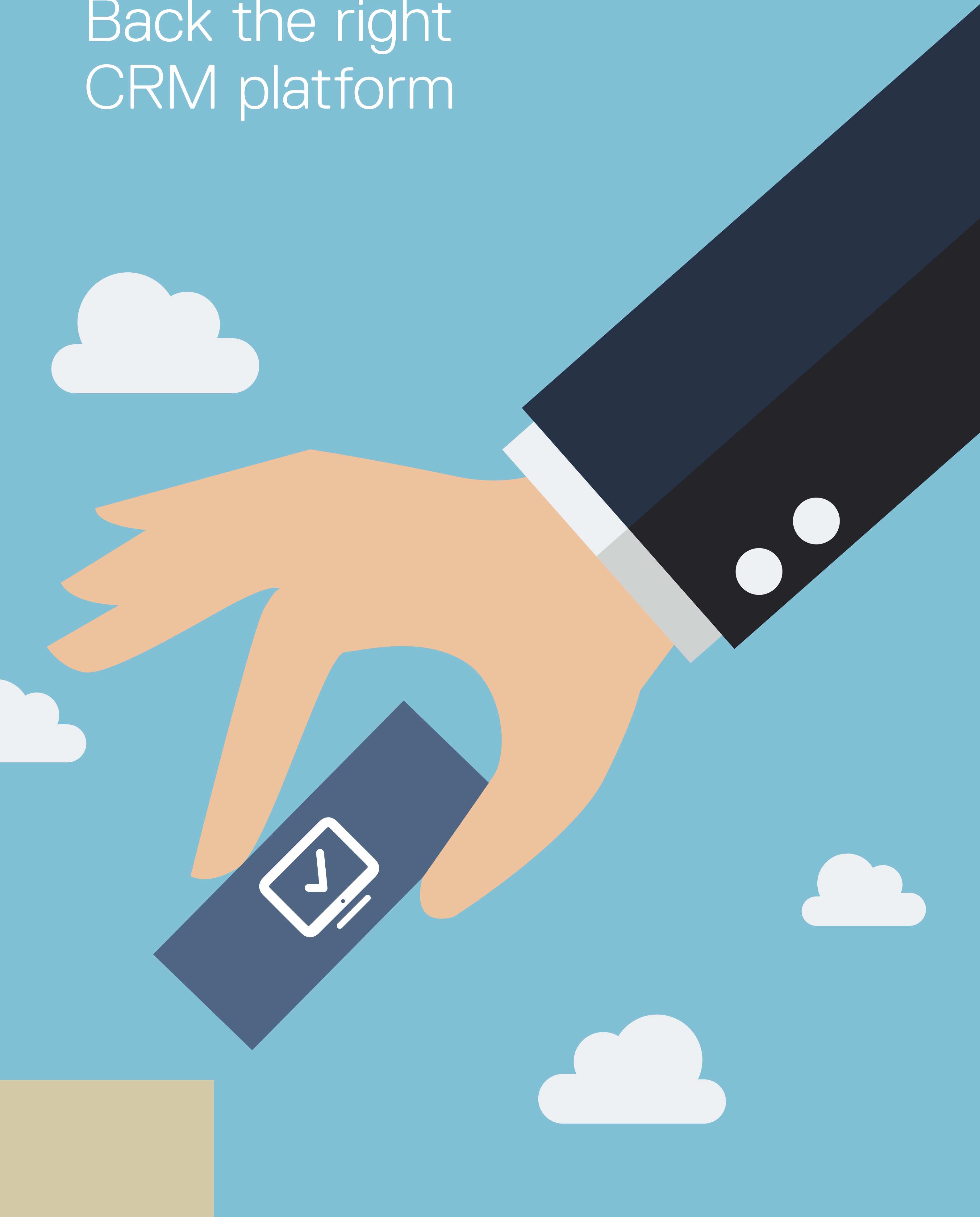
Contents

Section 1: Back the right CRM platform

Section 2: Design the system to empower your team

Section 3: Commit to continuous improvement

Section 1:
Back the right CRM platform



1.1 Define your priorities:

where to focus for a successful first project

What do we mean by CRM?

Customer relationship management (CRM) is a broad term that covers any business software system that help teams handle their customer interactions. Although CRM began with a focus on sales, leading CRMs are now robust Cloud technology platforms that span the entire customer lifecycle across marketing, sales, customer service, key account management, business intelligence and channel partner communities, to name a few.

Think of CRM as a platform to build business processes

More robust CRM platforms also have add-on applications for specific functions, such as quote and proposal generation, project management, HR, timesheets, live chat, field services, contract generation, marketing automation and more. Layer on top of that the ever-expanding capability of CRM platforms to connect to other business systems by application programming interface (API), and you're a long way from standard lead and opportunity pipeline management.

Where to begin?

Although the ultimate vision may be to bring your entire business onto a single, customer-centric platform that runs the whole show (or connects to your existing systems such as accounting, POS or ERP), it's best to begin by addressing a specific core function where your business is currently experiencing the most pain. Without a well-executed first project that delivers strong commercial wins, there won't be the momentum to expand the system into other areas of the business.

Let's look at some common business functions that typically come into a "phase 1" project in terms of their status-quo challenges and the solutions that a well-implemented CRM can deliver:

Sales

Status Quo (Spreadsheets)	Well-designed CRM (lead and opportunity management)
Leads falling through the cracks	Leads captured and auto-assigned, follow-up call cycles automated
Sales reps not following process	System built to enforce-best practice
Opportunities left with the "ball in their court"	Automated follow-up prompts and proactive opportunity pipeline management
A lot of time writing emails and creating quotes	Workflow automation to template and send common responses, automated quote and proposal generation
Managers asking team why they're not hitting target	Every meeting, email, call and task tracked and measured against KPIs and visualised in dashboards

Service

Status Quo (Phone and email)	Well-designed CRM (case management)
Conversations lost in inboxes	All emails, online form submissions, phone calls and live chat queries created as cases
Reps unable to prioritise their caseload	Cases auto-arranged in order of priority based on business rules
Unable to track performance against SLAs	Milestones and entitlements set up to ensure each customer gets the right level of service
Takes a long time for customers to speak to the right person	Cases auto-assigned to the most suitable agent based on skill set, capacity and availability

Marketing

Status Quo (batch-and-blast email marketing)	Well-designed CRM (marketing automation)
Marketing and sales operate independently without a joint strategy	Align sales process and marketing touch points into a cohesive customer journey
Emails get sent to the whole database	Customers are sent targeted, timely emails based on CRM data and content engagement
Marketing generates leads only at the point customers are ready to speak to sales	Campaigns are designed right the way through the customer journey, from researching, to solution selection, customer onboarding, cross-sell and upsell
Marketing only measures the cost-per-click or cost-per-lead of their digital marketing	Leads are tracked right the way through to a closed-won opportunity within CRM

Account management

Status Quo (disjointed systems, reactive)	Well-designed CRM (integrated systems, proactive)
Customer information stuck in isolated silos	Integration for a single view of the customer, including orders, invoices, projects, opportunities, cases, marketing engagement
Account managers take orders when they come in	Accounts tiered, call cycles defined, insights served based on historical data, account managers become proactive and insight-driven
Customers have unresolved service issues the account manager isn't aware of	Account managers are alerted and collaborate on resolution
Account planning is ad hoc or non-existent	Plans are put in place, KPIs are set and tracked with visual dashboards

Action

Select the function/s where your business is experiencing the greatest pain. Then write down the challenges you're facing with the current state of play in these areas, for example operational inefficiency, lack of visibility or customer dissatisfaction. Finally, brainstorm what you'd hope to see a well-design CRM deliver to help solve these problems.

At this stage, you don't need to have your requirements fully defined. You just need clarity on which functions of your business you'll be focusing on so you can begin assembling your project team.

1.2 Assemble your project team:

getting the right mix of people involved

In reality, when assembling your project team, you'll work with what you've got. If you're a smaller business without a large IT department, multiple business units, dedicated business analysts and project managers and a large senior leadership team, you'll assemble your team differently to a larger enterprise.

We've worked with many businesses between 10 -150 staff who have successfully implemented CRM by identifying the best people they have to fill the below roles:

Product owner

Typically a senior business manager

The person ultimately responsible for the success of the project and the CRM's ongoing evolution and expansion within the business. They'll play a leading role in the evaluation, implementation and future roadmap. They have a deep understanding of the team's operating environment, commercial drivers and business strategy.

They're able to:

- Clearly define the challenges and needs of the business
- Manage the project team - delegate, mentor and keep on track
- Manage the relationship with your implementation partner
- Understand and provide feedback on a technical scope
- "Sell" the CRM to the end users

Business user

Typically a manager of the team who will be using the CRM

The person who represents the "front line" perspective of the end users. They're at the coalface and will have the most in-depth understanding of how their teams work, their processes, current challenges and likely roadblocks to system adoption.

They're able to:

- Define existing business processes in detail
- Identify the gaps - double handling, slow manual processes, poor customer experience
- Articulate what data and insights they need to effectively manage their team
- Gather feedback from users and identify opportunities to improve the system over time

Technical user/s

Typically the most IT-savvy member/s of the team

This user/s may have a variety of responsibilities, including:

Super user: responsible for system testing, training and supporting users post-launch

System administrator: responsible for the ongoing maintenance and improvement of the system

IT support: integrating with other business systems

They're able to:

- Understand the system to a deeper technical level
- Communicate technical concepts to less-technical users in a training environment
- Troubleshoot and escalate technical issues to a CRM customer support team or consulting partner
- Learn how to customise the CRM platform to give users what they need over time

Action

Decide on the most suitable candidates to fill these roles. In our experience, project teams of 3 - 4 work best. Any more can be too many cooks in the kitchen.

1.3 Select the ideal CRM:

balancing functionality, scalability and cost

There are hundreds of CRM systems on the market. Although it's true that some are outright terrible, it's usually horses for courses. It's more about how the CRM you're considering fits your business. After it's all said and done, CRMs typically fall into four categories.

1

Bolt-on CRM

CRM is tacked onto another system as an additional "feature".

Plus	Minus
No cost	
They store contact information	All they do is store contact information

Examples: any ERP or Account system claiming to have a built-in CRM.

Price guide: Included

2 Out-of-the-box CRM

A basic "plug and play" solution.

Plus	Minus
Economical pricing	They "work how they work" with limited customisation
Cloud-based & Mobile-optimised	Usually don't integrate well with other business systems
Good for basic lead, opportunity and account management	They're usually a short-term "bandaid" solution and don't scale up well as business requirements evolve

Examples: PipeDrive, CapsuleCRM

Price guide: $10 - $50 per user, per month

3 Industry-designed CRM

Some Industries have "all-in-one" CRM tools that can run many functions within a business. They leverage industry knowledge and best-practices to design what they see as the best way of operating in that vertical.

Plus	Minus
They can be well thought through and align with industry norms	You have to change the way you operate to align with the way the system works
	They can remain isolated from other business systems or can cost a lot to integrate with less-robust APIs
	They're typically smaller niche players meaning they're potentially vulnerable to lack of investment in development and support

Examples: Fergus Trade Software, Infinitylaw

Price guide: $20 - $60 per user, per month

4

Full-platform CRM

Leading cloud technology platforms that empower businesses to build processes across almost any function from marketing and sales, through to service and project management.

Plus	Minus
Heavily customisable - with an underlying platform that can be developed on with clicks or code	They're not cheap
Trustworthy - with multiple data centers, robust security, strong customer support and local sales representatives and consulting partners	They can be a challenge to evaluate feature-for-feature - often it's only when you try to implement them that you realise their unique strengths, quirks and limitations
Constantly evolving - with multiple releases each year keeping their customers at the forefront	They act as a set of tools to build with. Customisation is required to drive value from the investment.
One platform - that either integrates with or natively handles virtually all business functions	

Price guide: $50 - $250 per user, per month

Examples: Salesforce, Microsoft Dynamics 365

Action

Decide from the outset which CRM camp you fall into, and then evaluate competing solutions. Compare a Ferrari against a Maserati, not a Ford.

Documenting your requirements

At this stage, you should know which type of solution you'll likely be evaluating. Before speaking to potential CRM providers, documenting your high-level requirements is critical. Going through this process has three main benefits:

1. It ensures your project team are aligned from the outset
2. It helps you get your bearings before speaking with CRM sales reps
3. It gets potential CRM providers and consulting partners up to speed quickly

Although many large enterprises opt to define their requirements in detail up front (over say, a 100 page requirements document) and then ask vendors to respond to an RFP, we don't recommend this approach for smaller organisations (or for that matter, larger ones!). A concise 1 - 3 page document should get the key information across.

Here's a basic framework and some thought starters to help you document your high-level requirements:

What does your business do?

Create a brief profile of your business to set context, detailing your:

- Value proposition
- Range of products and services
- Target market/s
- Company size, geography and organisational structure
- Roles within your business

What's led you to look at this project?

- What's the current state? Describe your existing business systems, processes, and challenges
- How is the current situation adversely impacting your users, company and customers?
- Why now? What are the main business drivers for looking at this project?
- How does this project relate to the wider goals of the organisation?

Outline the project

- What's your focus area/s for the initial implementation? (e.g. sales, account management, customer service)
- Will the system replace or integrate with existing systems?
- What non-standard features or functions do you see as critical? (there's no point writing features that all systems will have like "the ability to access customer contact information." Focus on things like "integrates with our accounting package" or "automates processes using workflow automation.")
- What do you see as the longer-term roadmap for CRM within the business?
- Are there any considerations around Cloud versus on-premise? In our view, Cloud is the way to go here unless there are regulations for your industry requiring data to be stored on-shore

Describe your users

- Who is the system for? User profiles may include: sales managers, field technicians, inside sales reps, account managers etc.

Then, for each user profile:

- How many users will there be and what is the range of technical ability?
- What are their existing attitudes towards CRM?
- What will the CRM allow users to do that they can't do now? For example, will the system help them:
    - Work faster by automating manual processes
    - Gain better customer visibility and insight through integration
    - Work more effectively with their teams through collaboration
    - Provide a better customer experience with best-practice processes and rep-to-customer automated communication
    - Manage more effectively with reports and dashboards

Action

Once you've documented your requirements, run them past members of your senior leadership team to ensure they're closely aligned with the wider strategic objectives of the business.

What does success look like?

- Imagine a well-designed and fully adopted system that's empowering your teams to do it "the right way" every time. How will this impact your users, company and customers?
- What metrics would you track to measure success?

When defining your requirements, you often "don't know what you don't know" so it's important to keep an open mind. It's totally natural for requirements to evolve throughout the evaluation as you learn about functionality you never knew existed, or ways CRM can tackle your business problems you may not have considered.

To integrate, or not to integrate

Note: this section contains tech jargon and acronyms! Skip this section if you're not planning on integrating your CRM with other systems.

Pulling data into a CRM, or pushing data into external systems can be more time-consuming and complex than anticipated. There needs to be a strong commercial reason to go down this road. "More visibility" isn't usually a strong enough driver on its own. Data needs to be used for a commercially beneficial reason to justify the investment. Common integration use cases include:

- Leveraging customer data to serve insights and alerts to account managers. For example, pulling sales data from an ERP system to identify a customer's decrease in spend or uncover a cross-sell or upsell opportunity
- Pushing CRM customer data into an external project management system
- Having "Won" sales opportunities in the CRM automatically create sales orders in an ERP system
- Bringing customer usage data from an external system into their own customer portal within the CRM, for example utilities or IT services

- Bringing external business data into the CRM so it can be leveraged for business intelligence
- Connecting to business-critical applications for a 360 view of the customer. For example, email, phone systems and customer survey tools

There are three broad types of integrations:

Application Programming Interface (API)

APIs open up parts of a system to be accessed by other API-enabled systems.

Plus	Minus
APIs can pull and push data in real time. They're also flexible, able to merge, format and run calculations on the data they're accessing	Not all APIs are created equal and some may not give you the functionality you need to achieve the commercial outcome you're seeking
Many developers have experience working with APIs	API connections can break when one system updates or changes. This can lead to unexpected additional expenses to "get the systems talking" again

Scheduled batch upload

An external system creates a CSV file on a schedule and places it in a location with File Transfer Protocol (FTP) access. This is then "picked up," formatted and imported into your CRM, leveraging a tool such as Skyvia.

Plus	Minus
The CRM development work is minimal	Your internal IT team or system integration provider will need to get the existing system producing CSV files on a schedule
Using a data loading tool is scalable - connections aren't likely to break	The integration isn't real time. Data is typically updated overnight
	These tools typically come with a monthly subscription cost

Middleware

Middleware sits between your CRM and other business systems, syncing and formatting data in real time. Middleware examples include Jitterbit and Mulesoft.

Plus	Minus
Middleware is real time and robust - connections are stable	Middleware can be an expensive investment, both in terms of ongoing software licenses and development

Pre-built Application

Many CRMs have an Apps Marketplace with pre-built connectors between popular software products and the CRM.

Plus	Minus
They're either free, or relatively inexpensive	They often require software license edition upgrades to unlock the API feature
Connectors are fast to install and configure	They "work how they work" and may not have all the functionality you need

In summary, integrations can be incredibly powerful, however if you're using anything other than an pre-built connector, you need to be confident the business case stacks up and make your peace with the associated investment.

Before you read further

If you've got this far and have decided that the best fit for your business is a bolt-on, out-of-the-box or industry-designed solution, the process is a lot more straightforward. You can research online, sign up for a few free trials and then see which solution stacks up best from a features versus price perspective. Typically the contracts are month to month, so there's lower risk and minimal (if any) implementation costs.

The remainder of this guide is dedicated to evaluating, implementing and continually improving a full-platform CRM solution. There's a lot more to talk about if you're looking to take this exciting and potentially transformational journey.

Navigating a full-platform CRM evaluation

With your requirements defined, you're ready to start researching potential CRM platforms.

G2Crowd.com

This website is a great place to start your investigation. It aggregates thousands of CRM reviews and feature comparisons and puts them in industry and business-size specific quadrants. You can then drill in, read reviews and compare. We'd recommend picking 5 to shortlist after reading reviews and visiting their websites.

Demos, customer stories and marketing videos

These can be a great way to quickly understand a platform's value proposition, high level features/benefits and typical customer pain points and how the CRM provides a solution. Remember, they are marketing so take what's said with a grain of salt.

If you sign up for a free trial, expect a call (or ten!) from sales reps looking to get you to sign up for a full account.

Free trials

For "Out-of-the-box" or "Industry-designed" solutions, free trials are great. As the system won't be heavily customised, free trials allow you to get hands on with the software that is a close representation to the product you'll actually be buying. This being said, they don't provide anything close to the complete picture when evaluating a full-platform CRM. It's kind of like getting a pile of tools and building materials and then trying to decide whether to buy the finished house.

Consultative sales process

If you're evaluating a full-platform CRM, this process will form an essential next step for those CRMs you've shortlisted. It's the only way to understand how a potential solution will work for your business specifically, what mix of licenses and functionality you'll need and what the costs will be. Because this process is a significant time investment for all parties, this process will be completed with your preferred 1 - 3 potential solutions. Due to the time investment, it should also only be undertaken if you're expecting to move forward with the project provided you find a suitable solution.

It begins with a CRM provider's account executive (AE). They may have local, on-the-ground sales staff, or this process may be done remotely from overseas. Typically they have different teams servicing businesses of different sizes. Some work with smaller businesses to a shorter, more transactional sales process, whereas others work with large enterprises on deals that may involve RFPs and take years to close. Typically, this is the process you'll go through:

1. **Initial discovery:** your AE will work to understand your business, processes, pain points, technical and functional requirements and will try to define broadly how they think their CRM platform can help you.

2. **Solution engineer and consulting partner engagement:** based on their initial discovery, the account executive will likely engage a consulting partner who has experience with similar projects and who they feel will work well with your internal team. If a custom demo is required, they'll also bring in a solution engineer (SE) who will work to build out and demonstrate a solution back to your business based on their discovery process.

3. **Joint discovery:** the AE, SE and consulting partner (also referred to as implementation partner) will then go into more detailed discovery. This may include a deep dive into core business processes, existing systems, ride-alongs, sitting shotgun with sales or service reps, customer journey mapping or technical sessions with your internal IT team. This process may cover single or multiple sessions depending on the scale and complexity of your project.

   These are the typical outcomes each party is seeking from the joint discovery process:

   a) **Project team:** you'll want to get a sense of how you think you'd work with all parties at the table. Be open to having your existing ideas and priorities challenged, but make sure you feel all parties are well aligned by the end of the session

   b) **Account executive:** to get a sense of your license volumes, internal decision-making process, potential roadblocks, competing solutions and likely timeline to close

   c) **Solution engineer:** to get enough detailed information to be able to build a compelling demo and potential future roadmap on the platform

d) **Consulting partner:** to get an understanding of the phase 1 solution design, future road map, implementation investment and the right engagement model (fixed rate, time and materials etc.).

4. **Tailored solution demo and implementation approach:** this may be in separate sessions or combined. The solution engineer will take you through an interactive “day in the life” of how your team will work within the system. The consulting partner will explain the solution design and run through how the implementation process will work start to finish.

5. **Commercials and sign-off:** you’ll then work through the comparison between any competing solutions and then finalise the implementation and license investment with your chosen provider.

That’s the process through to sign off, but what exactly should you be evaluating when considering a CRM and consulting partner?

What to evaluate in a CRM platform

Features and licenses

Most CRM platforms have different user licenses, each with their own mix of functionality. More robust CRMs can have seemingly infinite license options for the different parts of their platform, along with optional paid extras. For these more complex evaluations, getting clarity on what features each of your user types (e.g. customer service rep, general manager) will require to perform their role within the system is key. Be sure to dive into detailed feature comparison charts between license editions. If you’re in doubt about whether the license you’re looking at can handle a specific use case, ask the account executive and get responses in writing.

Flexibility

What tools do you have at your disposal to configure and customise the system? Can you create your own page layouts? Data validation rules? List views? Objects? Workflow processes? Reports? Dashboards? User security permissions? Can you insert your own branding? Can you develop on the platform using custom code?

User experience

A great UX isn't just a slick interface. It's really about how intuitive it is for a user to perform their day-to-day role within the system. How many clicks does it take them to log a task? Does the system automatically open the customer's details when they call the helpdesk? How does the desktop version translate to a mobile device? Are the reports and dashboards easy to interpret?

Customer experience

Does the CRM have functionality that allows your business to compete on customer experience? Auto-assigning leads to ensure faster response times. Personalising and automating rep-to-customer communication to enable more consistent, professional interactions. Giving customers access to tailored, interactive content through their own personalised community login to drive engagement. Leveraging marketing automation to deliver the right content at the right time.

Ease of integration

Is the CRM platform able to connect to your existing systems via an API integration, or native, pre-built connectors that have the bulk of the work already done for you? This is especially important for your email, VOIP phone system, document management system, accounting package, ERP or other critical business systems.

System upgrades

Does the system have a strong commitment to stay at the forefront? How often does the CRM release system upgrades? Are these upgrades free or paid? How does the company decide which features to prioritise? At least two major releases a year should be a benchmark for any full-platform CRM.

Ease of system administration

Once the system is live, what level of time and skill is required from your internal team to keep the system delivering for users? Is their online training courses, certification exams or in-depth training workshops to support members of your team to upskill on the platform?

Customer support

This is an important one. Does your licence entitle you to phone support, email support, live chat or simply an online knowledge base? Are there service level agreements on response times? Is there an option for premium support at an additional cost? Make sure you're confident that the CRM you're considering has a service model that will work for the needs of your business. There's nothing worse than being left in the lurch and unsupported.

The community

One of the greatest benefits of a leading full-platform CRM is the community of customers, users, developers and consultants that it fosters. Does the CRM have an Apps Marketplace where external developers can build applications that bring new functions, integrations and tools to the community? Does your city have a user group where members regularly meet to learn from and support each other? Is there an online community where members can collaborate and share ideas? Is there an annual conference? A vibrant community is a great sign of a satisfied, innovative and engaged customer base.

Long term road map

Is this a point solution that solves one problem (e.g. lead and pipeline management) and will have to be ripped out and replaced with something else as your needs evolve? Or is it an underlying technology platform that can expand with your business. Make sure you don't just evaluate your solution against your first project, but that it can handle phase 2 and beyond.

Cost and contract

The terms of a CRM contract are typically a negotiation for larger deals and can comprise a mix of user licenses and support or service contracts. Factors that can get you a better deal on your per-user license rate include signing up for a longer term, paying annually in advance, or a commitment to take further licenses on at a defined stage down the track.

Although buying more will reduce the per-user price, our advice is to only buy the mix of licenses that will address the business challenges that will from the focus of your first project. Don't get sold on additional bells and whistles that aren't aligned with your business case and may only become relevant down the track. Pay for what you need, when you need it.

Local customer references

Nothing is a substitute for hearing it direct from a customer. Speaking with other local businesses in similar (but non-competitive) industries who have successfully implemented the CRM you're evaluating, gives you an opportunity to learn from the experiences of those who have already travelled the road you're considering going down. Account executives will of course, only connect you with customers they're confident will speak highly of their product, but if a CRM provider can't point you to any similar, successful customers, this is a red flag.

Quantifying likely ROI

Many CRM providers have designed ROI templates to help prospective customers quantify the benefits they're likely to see post implementation. The numbers factor in variables such as increased lead generation, faster lead response times, reduced administration time, improved sales conversion rates, greater customer retention, higher spend per account and smoother onboarding of new team members. These templates are genuinely helpful when preparing your business case. This being said, it's best to enter conservative estimates to ensure your investment return is likely to stack up even if your real-world results end up less than industry averages.

Action

Write down the specific questions you need answered by any CRM provider on the above categories, as well as any industry-specific considerations. At the conclusion of your evaluation, score each competing CRM in these categories out of 10. You can also weight these categories based on your business priorities for a more bespoke scoring model.

Know the jargon

CRMs not only have different functionality, but they also have different terms for that functionality. Most will publish a glossary of their terms as well as plain-English functionality definitions in their product data sheet. We'd recommend familiarising yourself with both. This will help you communicate knowledgeably with your account executive and consulting partner and also give you a full picture of the platform's capability.

1.4 Assess consulting partners:

finding a partner that compliments your internal team's skill set

The role of an implementation partner

Implementation and consulting partners, like CRMs, come in all shapes and sizes. Although you may have hired an external IT consultant to help in your evaluation, an implementation partner is typically aligned with a specific CRM platform so their role isn't to offer impartial advice, but to show you how their approach can combine with the prospective CRM to deliver a system that achieves your business objectives. Think of the CRM as raw building materials, and the partner as the architect and builder.

Your account executive will connect you with a consulting partner they feel will work best with you. You're welcome to research and engage with any consulting partner you wish, however, due to the time involved we wouldn't recommend going through a full pre-sales process with more than two consulting partners.

As with CRMs, consulting partners tend to fall into a few broad classes. Depending on the nature of your project, the skills and capacity in your project team and your budget, one category of partner will be the stronger fit.

Freelance consultant

An experienced and certified “hired gun,” who will work as part of your project team. Typically a generalist who can both design and build the system. Ideal for technically savvy teams with well-defined requirements.

Typical project investment: $10,000 - $50,000

Plus	Minus
If they’re a “unicorn,” they’ll have a blend of business analysis, solution architecture, technical development and change management skills	More likely, they’ll be stronger in some areas and weaker in others with potentially critical gaps in their knowledge
They’re typically onsite and dedicated for the length of the project	After the project, they’re on to the next one and typically don’t have the capacity to manage ongoing system iterations
They’ll become an integral part of your project team	They’ll require strong direction on what you want, usually asking for requirements versus crafting solutions to solve business challenges

Package-based consultancy (low tier)

Usually specialising in a high-volume templated implementations with a base package plus a menu of additional options. Ideal for businesses with simple requirements on tight budgets.

Typical project investment: $5,000 - $15,000

Plus	Minus
Simple to understand packages	Not designed for unique requirements
Affordable, fixed rate engagements	Often light on consulting time, with most of the development work outsourced offshore

Technical development shop (mid tier)

Typically engaged in challenging projects involving custom integration or bespoke development. Good for businesses with complex, well-defined requirements looking for strong coding skills to bring them to life.

Typical project investment: $20,000 - $100,000

Plus	Minus
A multidisciplinary team with deep technical resources	They often don't connect their development to user experience and commercial outcomes. Your project team will need to help them bridge this gap
Can make the CRM do exactly what you want it to do	Often developers will opt for working with custom code versus declarative configuration. This can make the system harder for future admins to work with over time

Consulting shop (mid tier)

They typically blend business and IT consulting and some incorporate digital marketing into their practice. They're great at crafting systems that solve business challenges. Ideal for businesses who need guidance on best practice, user and customer experience, and business process improvement as part of the implementation.

Typical project investment: $20,000 - $100,000

Plus	Minus
They lead you through the process and don't expect you to know exactly what you need	They can make assumptions about your business so it's important not to blindly follow. Make sure you sense check their recommendations
They're typically strong on building systems with configuration versus custom code. This makes the system scalable and easy to work with for future system admins	Some are not as strong on custom development, meaning there may be limitations in their ability to deliver complex integrations and bespoke system functionality

Enterprise consulting firm (top tier)

These firms typically work with large enterprises on complex projects that involve hundreds or even thousands of users. They come fully-equipped with business analysts, functional and technical consultants, developers, project managers and client relationship managers.

Typical project investment: $100,000+

Plus	Minus
They've invested in building teams with deep knowledge across the CRM platform	They call in the cavalry. Assembling a full team of specialists doesn't come cheap
They've got the expertise and scale to pull off large digital transformation projects	Often smaller businesses can get a comparable solution for a more economical investment with the right mid tier consulting partner

What to look for in a consulting partner

Do they "get it"?

Do they have an innate understanding of your business problems and how to solve them with CRM? During their discovery, they shouldn't simply be asking questions about what you want, but suggesting solutions that you feel will work for your users, customers and drive the commercial outcomes you're seeking. You know your business, so trust your intuition here.

Are they certified?

Most CRMs have full certification programmes with different technical, functional and specialist qualifications across their platform. These aren't easy to achieve and often have regular maintenance exams required to keep certifications current. Having these demonstrates they possess the technical skills and understanding of best practice to do the job.

Have they completed comparable projects?

Having project experience in your industry is preferable, but not always possible (especially if you work in a more niche industry). If the consultant hasn't got deep industry context, make sure they have at least completed projects that tackle similar use cases. For example, sales reps selling on the road, customer helpdesk for B2B or B2C, selling complex solutions with long sales cycles, automating contract and renewal processes, qualification of high volumes of inbound leads etc.

Can they whiteboard it?

Following their initial discovery, your prospective consultant should be able to clearly present their high-level solution design back to your project team with a diagram on the whiteboard. Take note of whether they're explaining the intricacies and benefits of the new processes they're proposing as they go. Can they relate these to outcomes for your end users, customers and how they tie in with your business objectives?

Who specifically will they be putting on your project and why?

Prior to sign off, you'll likely be dealing with the consultant who handles what the industry calls "pre-sales." This person is responsible for designing and pricing the high-level solution, however they may not be the consultant responsible for actually delivering the project. This is fine as pre-sales and project delivery have different skills, but you'll want to learn more about the consultants being assigned to your project. Ask for a bio on each to make sure they have the certifications, industry context and technical experience to deliver the solution you need.

How are they pricing their engagement?

There are many ways of pricing a project, including fixed rate, paid scoping engagement and time and materials, to name a few. Make sure you understand and are comfortable with the proposed pricing model. Get clarity on when the final bill will be sent, what happens if requirements arise that are out of scope and what time is allocated to system iterations and refinements. It's also worth reading their terms. This is a significant investment so make sure you know what you're agreeing to.

What's their project delivery process?

There are different IT project delivery methodologies. The most common being a linear "Waterfall" process, versus an iterative "Agile" process. This subject will be dealt with later in the guide (on page 34) , but make sure they provide you with documentation of the process end to end. It should be clear who is responsible for delivering what. For example, who is formatting the customer data prior to import? Who is testing the system? Who is training the users? Is it the consulting partner or your project team?

How will they support the system rollout?

Once the system is built, what has your perspective partner recommended as the rollout and change management process? Who will demo the system to the users? How will users be trained? How will feedback for system iterations be collated and executed? Make sure that this has been covered and that your project team are confident they can deliver what's being asked of them.

Can they provide the level of post-project support you'll need?

After the users are trained and you're up and running, are they able to provide the level of ongoing support you'll likely need? Options here can involve everything from "here are the keys, start driving," right the way through to managed services with regular system reviews and iteration cycles. You may not know what you'll need post-deployment at this stage, but it's good to know what options are available to you.

Do they have customer references?

The best way of assessing your potential partner's trustworthiness and ability to execute is to speak with their customers directly.

Action

Score each consulting partner in these categories out of 10. You can also weight these categories based on your business priorities for a more bespoke scoring model.

Do you get on with them?

These relationships tend to go on for years, not months. Provided your initial project is successful, consulting partners often become a long-term strategic partner. They'll be working on further-phase projects, giving guidance on newly-released features that your business can leverage, helping manage the iteration cycle to continuously improve your CRM's performance. So make sure they're the kind of people you enjoy working with. If the idea of speaking to them two years down the track is likely to make your head spin, keep searching.

Signed up and ready to go!

You've now backed your chosen CRM platform and implementation partner. It's time to get the project kicked into gear.

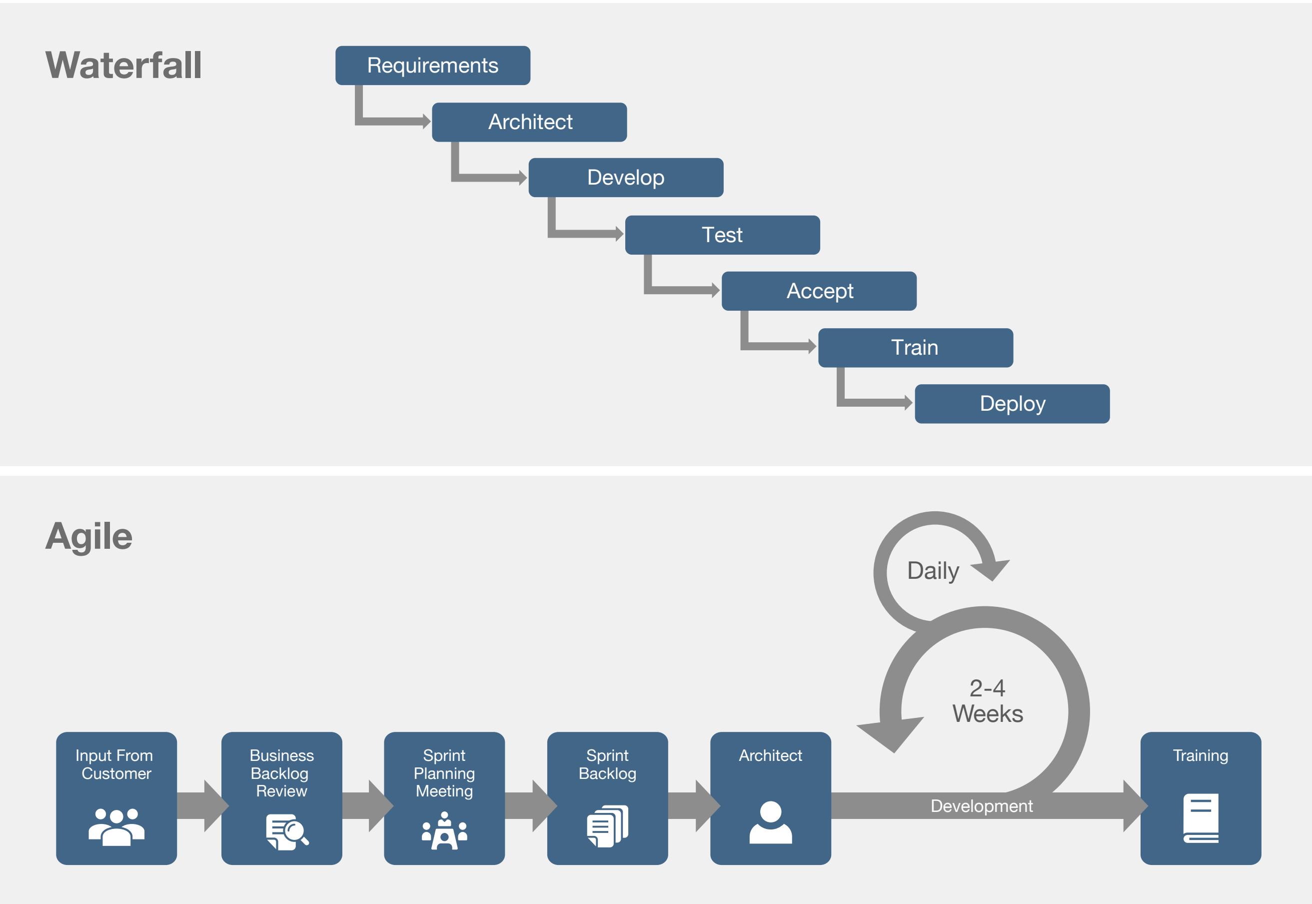
Section 2:
Design the system to empower your team

2.1 Implement the system:

with a proven framework that takes you through scoping, building, testing, releasing and refining

Agile versus Waterfall

You may hear a lot about a consulting partner's recommended project management methodology. Although there are many variations, there are two that typically get put forward for a CRM project: Agile and Waterfall. This is a topic too deep for this guide, but on a high level, the below diagram explains how each works:



In essence, Waterfall tries to consider all requirements up front, then builds the system in a single push with a “big reveal” to the project team at the end. Conversely, Agile is about rapidly designing working components of a system quickly, testing and iterating and then designing more working components to layer on top of the existing system. Waterfall has traditionally been used for CRM deployments, whereas Agile has been used more for custom software development. This being said, Agile is now beginning to gain traction as a potential methodology for CRM.

What LavaBox recommends and why

For the initial CRM implementation, we don’t see Agile as the right way to go for most projects. This is largely because SME project teams and users don’t have the Agile project experience, or internal capacity to go through an Agile process. With an Agile approach, the first iteration of your system will likely only perform a narrow part of a user’s day-to-day role, or will set the system up in such a “blank canvas” way that many rounds of iterations are required to get real wins for users. This risks disengaging users at the outset with an “unworkable” initial system, and often tie up the project team in a seemingly never-ending iteration cycle.

That being said, a pure Waterfall approach can’t consider all requirements up front, no matter how hard you try. There are certain insights that only become apparent when the users are performing their role in the system on the front line.

We’ve developed a hybrid methodology that we see as combining the best of both approaches in a process that a typical SME project team can work with.

Our goal:

To give users a system that improves their lives from day one, while also giving them the opportunity to provide feedback and see the system rapidly improve.

The LavaBox Implementation process

Below is the process we go through to implement CRM into our clients' businesses step by step. Other CRM consultancies will no doubt have their own approaches, many of which will likely reflect elements of ours. All we can say, is we've found this methodology works best for our SME clients. We use it for every implementation or significant further-phase project. As this is our approach, this section refers to what "we" do throughout your project as opposed to "your consulting partner" as approaches between consulting partners often vary.

Here's how it works:

Scoping phase (2 - 3 weeks)

Scoping session

Your project begins with an in-depth scoping session, typically lasting between 2 - 5 hours. This is led by a Senior Consultant who will be your Project Lead. They're responsible for designing the system and keeping the project on track. Along with this, there will be a Technical Consultant if complex development work or integration is required and a Junior Consultant to help with the system build. We also like to have our CRM Practice Lead sitting in on scoping sessions so they're able to provide guidance to our consultants throughout the project.

During this session we define how your business processes will not only be replicated, but enhanced.

During scoping, every project will cover:

- Your customer journey and business processes in granular detail
- How each job role will function within the system
- Security permissions and profiles
- Data to be captured at each stage of the process
- Automated rep-to-customer emails
- Reports and dashboards
- Integration approach (if required)
- Project plan and timeline

Depending on the focus of your project, we'll also be diving into specific functional areas as below:

Sales

We look at your customer journey from lead through to contract signed. Areas of opportunity may include:

- **Defining a best-practice sales process –** and ensuring your CRM is structured around it
- **Automation –** across lead follow up, nurturing and document management
- **Nothing slips through the cracks –** with web-to-lead, assignment rules, action list views
- **Management visibility –** defining KPIs, custom reports and dashboards

Account Management

We put a structure in place to proactively service and grow your existing customer accounts. Areas of opportunity may include:

- **Defining account service processes and KPIs –** based on vertical, territory or spend
- **Customer onboarding –** delivering an exceptional experience to every new customer

Customer Service

We start by looking at how your service team operates. Then we develop an architecture for your help desk that can be brought to life within your CRM. Areas of opportunity may include:

- **Automate and prioritise –** getting cases in the hands of the right agents
- **Deliver on SLAs –** with entitlements and milestones
- **Help customers help themselves –** with a customer community and knowledge base
- **Drive team efficiency –** with rule-based queues that get reps working top to bottom in rhythm
- **Deliver in the field –** scheduling work orders, dispatching technicians and optimising resolution workflow

Marketing Automation

We design a marketing automation strategy to influence your customers throughout their lifecycle. Areas of opportunity may include:

- **Database segmentation –** how to cut and slice your customer data
- **Priority campaigns –** where to invest to capture low-hanging fruit
- **Content strategy –** how to create authentic, tailored content that connects

Integration, Applications & Development

Bringing systems and applications together to build beautiful customer experiences and business processes. Areas of opportunity may include:

- API & Middleware integrations
- Custom application deployments

This is a guided, collaborative process and will naturally uncover further information we need to progress. Typically we're whiteboarding, looking at the core CRM objects on the big screen and furiously taking notes. We don't ask our clients to prepare additional process or requirement documents, however it's best to provide any you have on hand.

Rule of thumb: automate processes that are market-tested

CRM presents the opportunity to completely re-design and automate your business processes. This is great for speeding up and streamlining well-understood processes that are currently operating. However automation can come with risks when working with brand new offerings. If you're designing a process for a new product, service or business unit that hasn't been released in the market, proceed with caution. Often, the way you think these processes will work at the scoping phase don't totally map to what transpires out in the field when the offering is launched.

Automating processes makes them harder for your consulting partner or system admin to re-engineer later, if they don't work as expected. Our advice is to automate processes that you know will hold up in the front line. If you're unsure, leave them as manual and then automate once they're tried and tested.

Documentation

Next, your Project Lead prepares a detailed scoping document that explains exactly how each aspect of your system will function. The scope also includes a list of things required from your project team before we're able to begin the build. This may include business process documents, sample data from your existing system, login and admin access to your new CRM system etc.

Your scope is quality-checked by our CRM Practice Lead before being shared with your project team for review.

Working with a scoping document

Consultancies will have their own format to prepare a scoping document. Some write documents detailing "acceptance criteria." For example, criteria: "a user will automatically have leads assigned to them based on web form criteria." We believe that the criteria needs to be considered, defined and documented up front. Otherwise, what's in or out of the agreed scope can get blurry. For that reason, we recommend documenting every field, automation, assignment rule, object status - everything.

Scope refinements

We'd recommend your project team reviews the scope independently and documents their questions and suggestions. Then, your team can share their ideas and agree on a collated list of proposed enhancements before going back to your consulting partner.

Feedback and refinements

This is the first iteration phase within the project where we try and get the original scope closer to the mark before we start the build. During a dedicated refinements session we sense check your proposed scope enhancements before agreeing on a confirmed list. The scoping document is then updated and signed off. We're now ready to build your system.

Building phase (2 - 5 weeks)

System development

With an approved scope, we're able to build your system in one end to end "flow," without needing to stop for constant feedback and testing. Weekly project meetings are scheduled to keep your team across progress and discuss any unexpected technical issues/findings.

Data migration prep

During the build, your project team's main job will be preparing your existing customer data for migration. Before exporting data out of your existing system, you'll be provided with the CRM data model and CSV file format to work with when exporting. You'll want to make sure all lead or opportunity stages are up to date, delete any duplicates, and complete any critical customer information that's missing. This is a job that can easily be picked up and owned by a junior member of your team if being done manually. Deduplication and data cleansing can also often be automated using specific tools and is something your consulting partner can help with if there's enough scale in this work to justify the investment.

Testing phase (1 - 3 weeks)

The testing phase of the project has two objectives:

1. To fix any "bugs" and address any user experience issues before putting the system in the hands of end users (so they don't pull their hair out).
2. To get your super user/s ready to support your users when the system is launched.

The below is the approach we'd recommend:

Initial quality check

Before we release the system to your project team, we perform an initial quality check and fix any apparent issues. It's not possible to catch everything in this check, but we want to get as close to perfect as possible.

System demo session

After a whole lot of work, it's time for the big reveal. Your project lead will take your project team through the system end to end, answer questions and get your initial feedback.

Video tutorials

We've found producing custom-made video tutorials on each core aspect of your system incredibly valuable. These are perfect for your project team and end users to refer to as they familiarise themselves. They're also a great onboarding tool for new employees down the track.

Super user training

It's important to have someone on your project team who understands the system to a higher technical level as a "super user." This will be the person responsible for training other users and answering any ongoing, ad hoc questions. Your super user will receive a dedicated training session covering basic system admin skills such as setting up new users, reports and dashboards. We also provide them with a framework to run team training and onboarding if they'll be leading this (versus the consulting partner).

User acceptance testing (UAT)

Before we release the system to your entire team, we want to identify and iron out any remaining kinks. Your project team will be given access to use the system for 2 weeks prior to the wider release. During this time, it's important to note down any bugs or errors and promptly feed these back to us, as well as any ideas for further system enhancements. Making another round of system enhancements at this stage is critical for getting us another step closer to the mark.

A critical distinction: bugs versus enhancements

During testing, it's important to understand how your consulting partner defines a system error or "bug," versus a system enhancement and how these are charged. This is how we define them and how they're tackled from a billing perspective:

System errors: a user action returning a system error message due to work LavaBox has performed on the system, or, a piece of the system that does not correctly perform its function as per the documented scope. Any system errors (often referred to as bugs) found during the testing phase up will be fixed free of charge.

System enhancements: ideas for improving the system, relating to user experience, data capture, the way in which a function is performed or a new function not included in the project scope. System enhancements are performed at our hourly charge out rate.

With testing completed and a round of iterations made, you're now ready for the rubber to hit the road and put the system in the hands of your end users.

2.2 Engage and train your team:

hitting the mark with your system presentation, demo and training workshop

Releasing phase (1 - 2 weeks)

Your CRM system only delivers commercial wins when everyone commits to learning it, using it and improving it. This doesn't happen automatically. Rolling out a CRM requires a defined plan, and the commitment to execute it.

Consulting partner or project team – who should lead the rollout?

Some project teams have experience with training users on new technology, whereas others prefer to defer to a change management specialist within their consulting partner's firm. Regardless of who leads the rollout effort, the below process needs to be delivered to ensure users adopt the system.

System presentation, demo and training workshop

Team buy-in from the outset is critical. The initial workshop to enable your team must sell your users on the benefits of the new system, teach them how to use it and clearly explain the road ahead. Your product owner will typically craft the commercial aspects of the presentation (accompanied by a slide deck), with your super user or consulting partner running the demo and training aspects of the session.

If the system covers multiple user roles (for example, sales and service reps), separate workshops should be developed for each team to keep the content relevant for the best outcome.

Below is our recommended structure for this critical session:

System presentation

1. Why we've decided to run with CRM - (product owner)

This is where you make the business case to the wider team. The key is to begin by "meeting the audience where they're at," building credibility by acknowledging any preconceived notions about CRM. You might reference general reservations they may have about adopting new technology or frankly address where previous attempts at deploying CRM haven't succeeded. The goal is to connect the introduction of the new system to the wider goals of the organisation and to the empowerment of end users in their roles.

2. Key outcomes for you, the company and our customers (product owner)

We've found, the best way of framing the system's desired commercial outcomes, is three-fold - the impact on the individual user, the company they're a part of and the customers they serve:

- **The individual user –** How will the new system help them to excel day-to-day? Consider ways the system will save them time, give them easy access to customer information, improve collaboration and serve them insights on the best next action.
- **The company –** How will the new system contribute to the success of the company? The implications can be wide-ranging. Consider ways the system allows your business to onboard new employees faster, enable processes to be standardised and improved, get real-time access to customer data to make smarter decisions or speed up time-to-market for new product or service offerings.
- **The end customer –** When prospective customers are buying a complex or high-value product, the experience they get matters. Customers equate an exceptional sales experience with the likely quality of the product or service they'll get after they've made the purchase. Once a customer, if they receive first-rate onboarding, account service and customer support, they're likely to buy more of what you're offering and become a brand advocate. How does the new system enable your company to compete and win on customer experience, not just product or price?

3. System demo (consulting partner or super user)

The demo is the first time most users will actually see the system. To state the obvious, first impressions count. A botched demo can cause negative sentiment to catch like wildfire amongst users. If your super user takes this on (versus your consulting partner), here are a few tips to help them nail the demo:

- Replicate the general structure of the "big reveal" system demo your consulting partner gave to your project team
- Make sure your super user has had a dummy run through in front of a small audience (with feedback provided) so it's smooth on the day
- Begin the demo with an orientation, including logging in and an overview of the home screen and navigation tabs
- Next, take a liner journey through the core business process end to end
- As you go, be sure to reference any automation and areas where the process has been enhanced to improve the lives of users and customers
- Finish with reports, dashboards, the mobile application and any custom development

4. Keys to system adoption (consulting partner or super user)

It's a good idea to touch on some system adoption best practices to get users in the right frame of mind before they get stuck in. Remind them that the system they're using is not the final version and will evolve based on their input. Make sure they're aware of the format they should be providing their feedback and when they can expect to see changes reflected in the live system.

5. User Q&A (open discussion)

Finally, finish the presentation with an open Q&A to give users a chance to share their thoughts on what they've just seen in the demo and on their journey ahead.

If it's not in the CRM, it doesn't exist.

All team meetings, one-on-one reviews, KPIs and compensation should be based on the data within the system. This means managers should be referencing their dashboards when speaking with their teams on a daily basis. If team members aren't keeping their information up to date, this will become immediately apparent. If a rep's incomplete records derail a sales meeting in front of the whole team, they'll quickly get the point.

System training

Following the presentation, we'd recommend users break out into small groups of 3 - 4, with super users and/or change management consultants rotating through each group, drip feeding users each piece of the process. Each round, they're able to answer any lingering questions before showing users the next part of the system. Small groups also encourage users to support and learn from each other, which is a behaviour you want to embed as the system is used going forward.

What users need for the session

Make sure users come to the session ready to go. Ask them to bring their laptop (charged), mobile device (with mobile app downloaded) and provide them with their username / password. Also ask them to log in well before the session to ensure there's no issues standing in the way on the day.

You've now got a system in the hands of end users and a successful CRM deployment is in sight. But you're not there yet – the next 2 - 4 weeks will be critical in determining the project's success.

Section 3: Commit to continuous improvement

3.1 Manage the iteration cycle:

collating and prioritising user feedback, executing changes and updating users

There is a critical stage your CRM project must pass through to succeed:

If users provide feedback and see the system improve, you've got them. It's now their system and they're advocates for its continuous evolution within your organisation.

However, if you don't make it to this important milestone, you've likely got a failed CRM deployment to answer for.

Far too many organisations fall over at this critical step. Don't let yours be one of them. The below approach can be delivered with the support of your consulting partner, or independently if your project team is up to the challenge. It's designed to ensure your system improves based on the insights gained by users on the front line:

Refining phase (ongoing process)

1. Gathering feedback

Users should feel supported
For the first few weeks, super users should be available as a first port of call for users' questions and queries. If users feel like they're neglected they'll quickly disengage and getting them back on track can be difficult. More technically-challenged users may also need one-on-one sessions with a super user until they've grasped the core processes and concepts.

Make it easy for users to provide feedback while they're using the system

For most users, ideas for potential improvements arise for a brief moment while they're using the system. If they don't note this feedback down, it's out of their head and they're on with their busy day. For this reason, creating a place within the CRM for users to contextually share and collaborate around ideas for system enhancements is critical.

Leading CRMs have internal collaboration tools that mirror many familiar functions available in social media tools such as likes, up votes, shares and polls. Creating topic-specific feedback groups makes it easy to bring users' suggestions together in one place. It also encourages debate and discussion, while making it easy for the project team to collate and review potential enhancement ideas.

Ask users for their feedback in a group setting

We'd recommend your project team run small focus groups (up to 6 users per group) around the 2 and 6 week mark following the initial training workshop. This is a more structured opportunity for users to speak directly with the project team and each other. Below are some thought starters to elicit feedback from these sessions:

- On a scale from 1 - 10, how are you finding the system and why?
- Are you finding it genuinely useful in your day-to-day role?
- Specifically, how has the system changed the way you work?
- Are you feeling adequately supported by your team and super users?
- What are your main challenges using the system?
- If you could make a few key changes to the system to make your life easier, what would they be?
- Is there anything you feel the system should do that it doesn't do?
- Have you encountered any errors or bugs we should know about?

Frustration often leads to improvements

Remind users to pay attention to any time they get agitated when using their new CRM. This either means they're not using the system correctly (which can be addressed with further training), or that they've found an opportunity improve things.

Educate users on what's possible

Users won't fully understand how a CRM can be customised. It follows they won't necessarily connect the ways in which their frustrations can be translated into improvements. Some basic education around aspects of the system that can be enhanced should be provided. These include identifying bugs they've encountered, as well as potential system refinements, including:

- **Relevance of data being captured –** when the system is requiring mandatory data to be input too early or late in the process, necessary fields to add or irrelevant ones to remove, duplicate customer information that needs to be cleansed
- **User experience –** making page layouts more intuitive by grouping relevant fields together, splitting pages into tabs for less scrolling, performing actions with less clicks
- **Reports and dashboards –** additional or irrelevant reports, inaccurate reports requiring improved data validation
- **Automated customer touch points –** adjustments to email templates, follow-up tasks, call cycles
- **Manual processes that can be automated –** can workflow help them perform a task faster?

The data doesn't lie - use adoption dashboards

Many CRMs have out-of-the-box adoption dashboards which give a clear picture of how the system is being taken up by users. These dashboards track aspects such as login count, time spent in the system, page views and usage of key functionality.

2. Prioritising Feedback

Fortnightly > monthly > quarterly

Remember, the first month is critical. Users must see that their feedback is noted and promptly actioned. We'd recommend reviewing feedback fortnightly for the first month, then at months 2 and 3, then quarterly for the remainder of the first year post-deployment. Book these sessions in your project team's calendars at the outset to ensure they happen.

Establish what changes are worth making and in what order

Prior to your project team's refinement sessions, we'd recommend your super user reviews the latest feedback, collates all suggestions and categorises suggestions into the below classes:

Project road map	Ideas for significant projects that will require further scoping and investment. Example: Have the system handle our contract renewal process.
Declarative changes	Simple, quick wins to improve user experience, data validation, fields, security permissions etc. Usually there will be no scoping required - just a yes/no decision. Examples: Add mandatory "lead source" field to lead object. Change "sales activity report" to a pie graph for better data visualisation.
Process changes	Changes to the way a user performs their role within the system. May involve workflow automation or custom code. Usually requires business consulting/ analysis input, light scoping and user training post-change. Example: Add new lead status: "wants information," which, when selected will automatically send information on products of interest to customer.
Not feasible	Suggestions that are technically not possible or simply not the way to go.

Once collated, the project team should review the list of potential refinements and weigh up the order of priorities. Some questions to help you rank system iterations include:

Cost:

- Can this change be executed quickly by a system admin or does it require technical development resource?
- Does the change require investment in consulting or senior team resource for process mapping and scoping?
- How easy will it be for users to adopt the new change? Will additional training be required?
- How much time is it likely to take to implement the change and at what approximate cost?

Benefit:

- How will this change improve the experience of our users and/or customers?
- Will this change help us market, sell or service more effectively?
- How many users does this change benefit?
- Will this change save us significant internal time and money in the long run?

Opportunity cost:

- If we don't do this, what will the impact be on our users, customers and company?
- If we prioritise this over other enhancements or projects, what is the impact of delaying other initiatives?

3. Executing changes

Use a Kanban style project management tool

Leveraging a cloud-based project management tool that allows teams to execute these changes is critical. We'd recommend looking at Trello (the most well known) as well as other options on review aggregator site, Capterra. There may also be a native project management application you can leverage within your chosen CRM such as TaskRay for Salesforce. This ensures the iteration cycle is well-managed and there's a common understanding of where everything is at.

Test before you release

Changes should be given to a small group of more technically-proficient end users to okay from a functionality and user acceptance perspective before pushing live. The safest way to do this is by using a development testing environment called a "Sandbox," which most leading CRMs make available. This allows development to happen safely and mistakes to be made without impacting the day-to-day lives of users within the live system.

Don't release changes without letting users know

Once you're ready to deploy changes, users need to be notified. This can be a simple post to the CRM's "system updates" group for straightforward tweaks, or scheduled training for more complex process enhancements.

When the iteration cycle is managed in this way, users see the commitment to improving the system directly related to supporting them to succeed in their role. This is a far cry from the historical connotations of CRM being "big brother" or a "beast to feed."

3.2 Clarify your road map:

with a set of future projects that support your business's long-term strategy

Your business doesn't stand still. Neither should your CRM.

Every time your business adds a new product or service, opens a new office, changes pricing or improves a process, your CRM should change with it. At its best, your CRM is a living, breathing reflection of best practice or, "the way we do things here." The system you built with your initial implementation will form a strong foundation and should constantly evolve and improve, but it doesn't have to stop there.

Now you've got momentum. What's next?

Once you've successfully navigated your first project, you've now got a system delivering tangible commercial wins. If you're the owner of your business, this should give you the confidence to continue your CRM journey. If you're the CRM product owner, you've now shown your internal stakeholders you've got what it takes to get CRM working in your organisation. There are typically three kinds of further-phase projects you may consider:

Integrated systems: with the core CRM setup, you may choose to focus on connecting your other key business systems to your CRM. This is an especially good option when you've got critical systems functioning completely independently from your core CRM.

Potential projects may include integrating your:

- ERP system
- POS system
- Accounting package
- Project management system
- Business intelligence application
- Phone system
- Legacy database
- Document management system

Additional layers: your first project handled the basic process, however the specific functions within that process are still happening manually. Building and automating these functions on top of your existing process doesn't bring any new user groups into your CRM environment (marketing or service teams, for example), however they add significant further value and efficiencies to existing users.

Potential projects may include:

- Quote and proposal generation
- Contract generation and eSignature
- Business card scanners
- Live chat
- Omni-channel service case management
- Core business process automation

New horizons: this is where you bring entire new functions of your business into the CRM environment. These projects will likely involve a different makeup of project team members from the new relevant departments.

Potential projects may focus on deploying business applications for:

- Customer helpdesk
- Marketing automation
- Back-office processes
- Project management
- HR
- Customer-facing mobile apps

- Customer or channel partner community
- Field service management system
- Time sheeting and resource planning

What to tackle first?

Focus on the area/s of your business where the most users or customers are experiencing the most pain. You can also consider running multiple projects concurrently, if your internal project team has the resource to handle it. Whichever project or projects you decide to put at the top of the list, remember that the process we've covered in this guide remains the same. There are no corners to be cut. Every new project needs to be driven by well-considered business requirements. It needs the right project team, technology, consulting partner and system design. Then it must be successfully implemented, rolled out and continuously improved to empower users and influence customers.

A final thought from the author:

The greatest competitive advantage SMEs have over their larger competitors is the ability to compete on customer experience.

In reality, the journey from your status quo of disparate systems and manual processes to a CRM that's running your entire business on an integrated, customer-centric platform is a never ending one.

At the beginning of this guide, we discussed the numerous opportunities a full-platform CRM provides across the customer journey from marketing, through to sales, service and beyond. By building these functions on your core CRM platform, you can seamlessly weave every business process and customer interaction together to differentiate and win on customer experience.

When everyone in your organisation is working on a single system that's constantly being expanded and improved upon, you're able to adapt faster, onboard new employees rapidly, exceed your customers' expectations and outmanoeuvre your competition at every turn.

Your larger competitors trying to deploy CRM across many hundreds or even thousands of users have their work cut out for them. Sure, they have the budgets and resources. They also have a lot of competing stakeholders with different agendas and a whole lot of users they have to get on board with the processes they design.

Speaking from personal experience, implementing CRM in our first business 10 years ago allowed us to take what our customers loved about us and build that “essence” into our CRM.

With a common understanding of “the way we do things here,” we were able to scale up without the wheels falling off and we’ve never looked back.

I encourage you to dream big and take this journey. It’s not fast, cheap or easy. But it will transform your business.

All the best,

Justin Lanigan
Managing Director
LavaBox

P.S. If you’d like to talk to LavaBox about an upcoming CRM project, we’d welcome the opportunity to explore ways we can partner with you.

Feel free to contact us on **+64 9 528 2269**, email **sales@lavabox.co.nz** or visit us at **lavabox.co.nz**