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Guide

Tips to help you with your CRM implementation

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“ It’s not just Scouts and Guides who should be prepared. If you’re implementing a new CRM – or still at the stage of thinking about it – you should take the time to get ready for the journey ahead. .”

Pedalling your way to success

Let's think of CRM implementation as a bike ride. Typically, there will be a few uphill sections along the way, always compensated by some smooth downhill runs. There'll be some decisions to make about which way to turn, and you'll need to keep an eye on the right route and other road users to make sure there are no unexpected collisions. I like to think you'll have packed a picnic to keep you going, but that's a whole other post.

Implementing a CRM system is not just about technology it's a strategy and a philosophy. So assuming that you've chosen the right one for you these five top tips will help you with the road ahead.

1. Do you know where you are going?

If you don't know where you're going, how will you know when you get there? Your CRM journey is no time for a lazy Sunday afternoon pedal. You need to know where you are going, what you're going to do, and what you are not going to do. Technically, this is your project scope, but most of us would just call it a plan.

Whether you are implementing with in-house resources, or using a vendor or consultant or a combination of these to support you, time is money. Without your project being scoped out you could waste a lot of time and a lot of money, and might face a lot of steep, energy-zapping hills. You will probably lose a bit of focus and enthusiasm and wonder what you're doing and why it was such a good idea.

For such a big, charity-changing decision like a new CRM, you need to know what lies ahead so you can plan that the right people are in the right places, doing the right things, at the right time. It will also mean you can measure what has happened against what was supposed to happen and if you take an accidental detour, figure out how you're going to get back on track to complete your journey.

Top tip:
Make sure of top management involvement from the start: it will make gaining buy-in so much easier. Don't start until you've clearly documented your project. At the minimum, you need terms of reference which includes the aims, scope and resources you need and will be using. Ideally you will also have identified what improvements the implementation will bring so you can evidence your success and measure return on investment. For those of us who like visual things, a timeline of what will happen, when and who will do it is also very helpful. It might be something as simple as a spreadsheet or a more detailed project management tool such as Trello Board.

2. What do you need to bring?

Putting a shopping basket on a top-notch titanium framed racing bike is not going to help the balance and performance of your ride. But where are you going to put all the bits you need to bring with you? In CRM journey terms, we are talking about legacy systems and integrations – things like your website CMS, email marketing tools, even accounting and HR tools. Bringing your data with you is a big part of the journey and being prepared for data migration should not be underestimated. Evaluate the data you have, identify whether it needs 'cleaning', and work with the vendor on data mapping to ensure the process goes smoothly.

Now is the time to take a look at what you need to bring with you and make some choices. Think about the tools you already have and how they are going to work with your new super-efficient CRM. You might not even be aware of some of the tools that are in use as others may have just adopted them to help them get on with their job. That might have been the right decision at the time, but now you're switching CRM, you could run into problems with systems that don't or won't easily integrate.

Think about whether you want to retire some tools in favour of the new CRM and map out whether integration is possible and what it will cost. The good thing is many systems now work with an open API (application programming interface) which makes integration much simpler.

Top Tip:
Make sure your CRM decision and planning includes all teams and departments, and that everyone is included and consulted about what is happening, why, when, and the impact it will have on them. This means scheduling departmental 'Discovery' sessions with your supplier to ensure the system is configured to meet their needs. It's also helpful to undertake a signposting exercise, which identifies the best 'tools' to use with your CRM. The joy of 'cloud' or 'platform' solutions and open APIs is that sometimes many tools are compatible and configurable, but if you are moving from working without a CRM to adding a CRM, you may need to take this opportunity to undertake a strategic digital review as well as choosing your CRM.

3. Agree with co-riders where you'll meet up en-route

No cyclist is an island, apparently, so it's pretty unlikely you'll be taking your bike ride alone. Inevitably you'll find that people ride at their own pace, some racing ahead and some plodding along admiring the view. The real danger is not that people fall behind (ever noticed, there's always someone at the back chivvying people along!) but that some will start to take a different route. You need to agree up front where to meet along the way to keep everyone on track – and on plan.

If people start to deviate from your CRM plan, problems start. Change control is vital. That's not to say you cannot change your plan. But how you change and how and who agrees the changes is critical. With no controls in place, the project can end up growing and expanding and never finishing, or worse morphing into several sub projects over which there is little control and no clear direction.

Top Tip:
Concentrate your time and resources on achieving the plan you agreed. Plan in regular review meetings (ideally weekly or fortnightly) with the key stakeholders from across the organisation and the vendor support/install team. These meetings are a vital opportunity for everyone to share their progress (and any delays or potential hazards), and identify any changes that may need to be made as a result. Where opportunities to add new tasks, deliverables or developments exist, agree when, where and how they will be dealt with – there may well be a second or third phase when the primary project has gone 'Live'? A single project leader is best to keep an overview of everyone's different views, orchestrate the meetings and bring people into accord. It is also useful to have a super-user who acts as the internal go-to person and as a link to the vendor.

4. You want me to ride where?

It came as a rude shock when I found out what a contour was and what that meant to my legs as I pedalled up a steep hill. I try and plan round them now, often taking a slightly longer route in preference!

A key part of your CRM is not just everyone following the plan – it is also that everyone is happy with what that means for their team. Faced with a new system, and potential changes to tools they've used quite happily before (see point 2), making sure everyone is pleased with how the system is working for them is vital.

User Acceptance Testing (to give it its grand title) at every step along the way makes sure that key business processes work. However much time you spend laying out key processes for your project scope, translating one way of doing things into a new system can take time to get right. Either way, it's a new approach and people need time to get used to it. Give them that time.

Top Tip:
Allow plenty of time for User Acceptance Testing. Don't save it all for the end, do it as you go along to help build familiarity with the new system and iron out any niggles along the way. Testing is a skill in itself, so you may want to call on specialist help to manage this for you.

5. Avoid collisions

The last thing we need on a lovely ride is a collision to spoil it all. You know the others in your peloton have probably got half an eye out for each other. But they're not the only people on the road ...

What could possibly cause a problem for your project? By staying on top of the risk points through the process, you will help avoid an internal crash and keep the project on course – yes, sometimes they happen, but you can usually get up, brush yourselves down and carry on.

A more serious risk lies with the others involved in your project – have they estimated their time requirements correctly? Is there enough training time scheduled in? Is there some flex if some things take more time or an unexpected snag comes up? One thing that should not be skimped on is training time – it is vital to ensure the project is successful, that the CRM is used properly and that it achieves the goals you set out at the start.

Top Tip:
A clear project scope should lay out all your requirements and avoid underestimates. Regular project review meetings highlight risks like this ahead of time so you can manage them – and agree whether and how additional charges or time requirements can be accommodated. The scope should clearly layout what your training needs are – how many teams/days? You can't skip this bit –it's critical to your project being successful. A budget contingency will be vital if you are not entirely sure at the start what your exact requirements will be.

Continuing the ride

Once you've made your decision to implement a new CRM, you're about a third of the way through your CRM journey. If you've planned your time and your journey, you should have no problems with this next third.

The final elements come a bit further down the line, as you monitor, refine, and review what your CRM is achieving for you. Make sure you schedule a post go-live review: map out the next phases with future proofing that includes an ongoing training plan, regular functionality review, and processes for monitoring return on investment.

CRM technology is rapidly developing with the advent of Social CRM, hosted CRM, cloud computing and integrated solutions which means that CRM projects can become more complex and far reaching. But if you apply these top tips you'll remain on your bike on the right route.

Project Checklist

1. Signing the CRM supplier contract – agree the level of implementation training and support before you sign
2. Scoping and Milestone Planning
3. Agreeing the 'lead' team - project manager, super user etc
4. Departmental Discovery Sessions with staff, CRM supplier and consultant if using
5. Data Migration Strategy
6. Integration with other tools or systems
7. System Configuration and User Acceptance Testing
8. Training
9. Go-live Support
10. Post Go-live review, schedule of further phases

This guide was updated and revised by Helen Dunnett for CultureHive in February 2018.
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