COMPLEX BUSINESS MADE SIMPLE

CRM ROLLOUT

A lot more than just “the software”

Read more at **mza.is/simplify**

DISCLAIMER

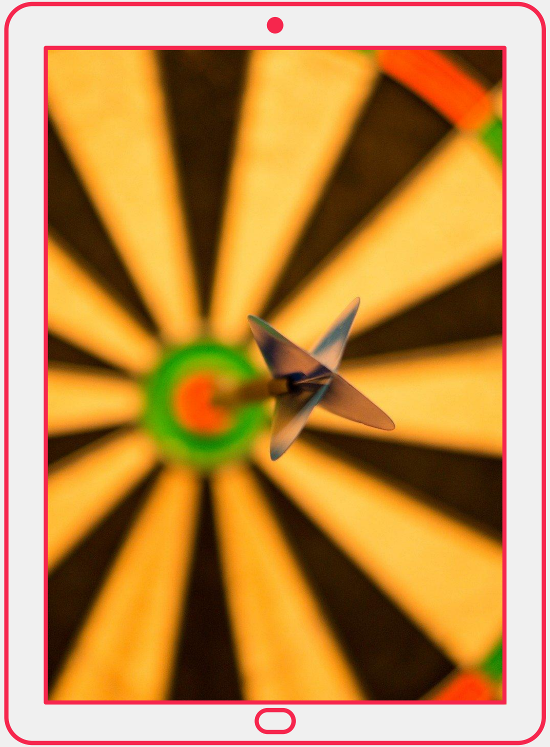
Not that we're talking about finance, but a quick disclaimer is needed. After all, it's serious business.

1. The content of this presentation has been designed with the specific aim to simplify complicated business scenarios.
2. Models and processes - especially those involving people - carry complexity. Without sharp know-how and experience, it can be challenging to grasp their nuances and in turn, what's important to focus on.
3. While the purpose of this document is to provide help and share knowledge around key topics, because of its nature it's far from being a complete/exhaustive set of tools.
4. When adopting methodologies, tools and approaches shared in these slides, it's important to tailor and adapt them to the environment you're operating in - not merely your specific needs.

There's a reason why there are professionals performing these activities for a living.
If you are unsure on how to proceed, please seek professional advice as it can save you time, money and ultimately provide a positive outcome to your goals.

PERFECT FOR THESE USE CASES

- Roll-out or changing company CRM
- Decide whether to pursue a CRM project alone or with a partner
- Are part of a company changing CRM
- Want to understand what needs to be addressed when introducing a big change in the organisation



CRM

CRM is an abused acronym in the business world. Here is what these slides talk about:

- A system used to manage customer-related information, even if not produced within the CRM itself; some examples include
  - Contacts at a company
  - Interactions
  - Quotations / Opportunities
  - Orders
  - Invoices
- A tool used by whoever interacts with a customer in any way, e.g.
  - Marketing
  - Sales
  - After-sales
  - Service
  - Supply Chain

Different tools use different terminology (e.g. Opportunities vs Deals, Companies vs Accounts), however this won't affect the roll-out process itself.

WHAT TO EXPECT

01

PROCESS MAPPING

Modeling the current situation

02

STAKEHOLDERS

Who to involve and how, for a successful outcome

03

COMMUNICATION

The most powerful tool in your belt

04

TRAINING & ROLLOUT

Getting everything ready for launch day

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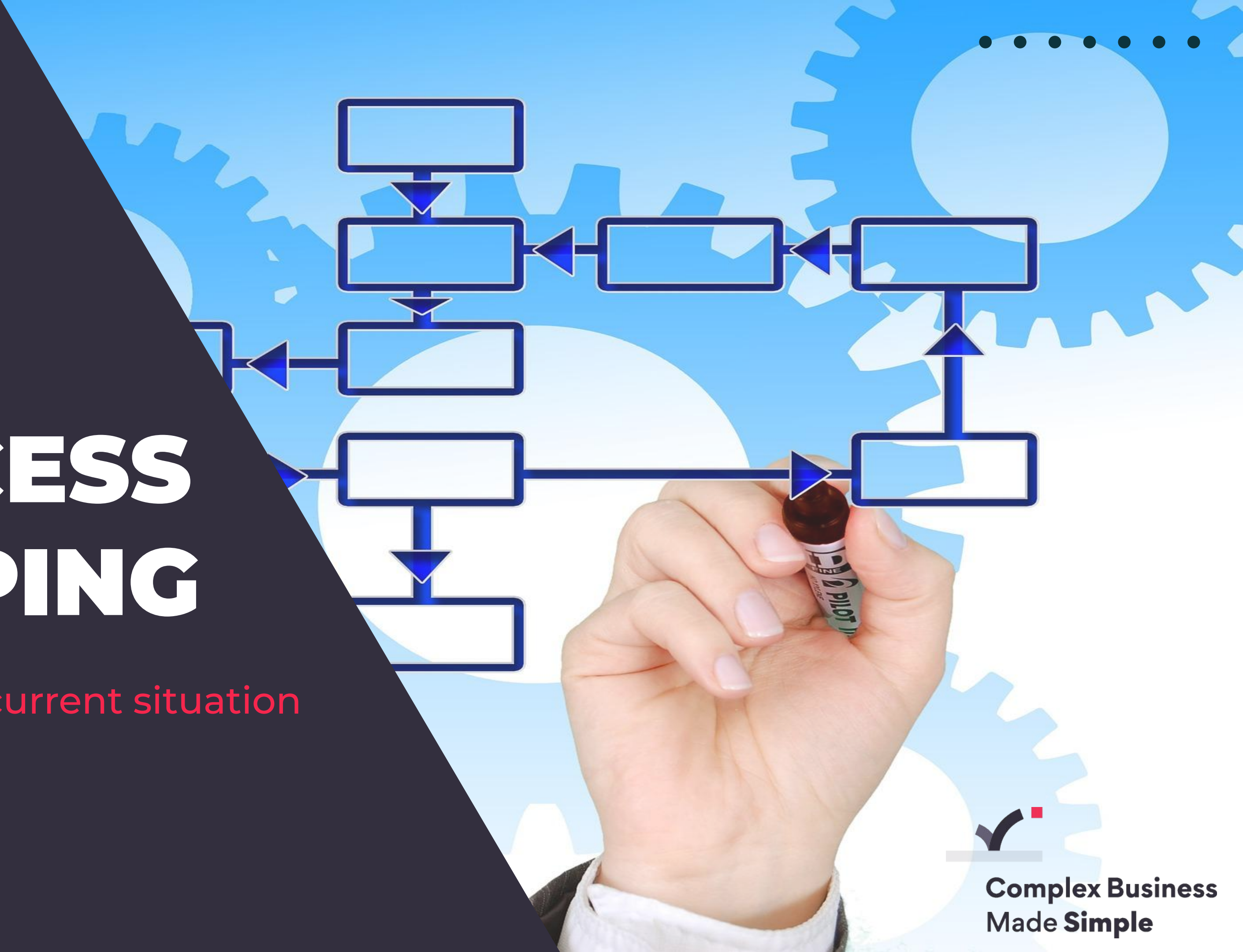
MEASUREMENT

You can't control what you don't measure

01.

PROCESS MAPPING

Modeling the current situation



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ROLL-OUT APPROACHES

External agency/consultancy

Pros

- Experts on the topic
- Expertise in your industry
- Can adapt business mapping to IT requirements

Cons

- Can be expensive
- Need to find the right partner

Pursued with internal resources

Pros

- Usually cheaper
- Knows who-does-what

Cons

- Internal biases
- Need to allocate full-time resource(s) for good results
- Narrower expertise

PROCESS MAPPING

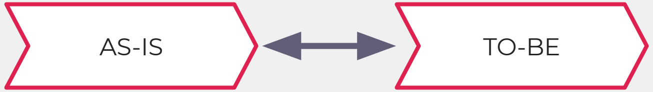
If you don’t have process/implementation experts in-house, use an external consultancy.

They’ll do the process mapping (and more) for you. They’ll outline requirements mainly through interview with key employees at different levels.

For simplicity, let’s assume you’ll engage with an external consultancy firm.

Done by an **external consultancy**

- Mapping AS-IS
- Mapping TO-BE
- Gap analysis
- Requirements



Done **internally**

- (Interviews)
- Driving TO-BE process (“Pain points and dream list”)
- Important: requirements!
- Implementing gap analysis results

PROCESS MAPPING

In the interview process, make sure to include:

- At least 1x person for each process/area of expertise
  - Make it 2+ for critical processes (e.g. opportunity management)
- Every level of the organigram, not just senior/middle management
  - Prioritise who is going to PUT data into the system
  - In most cases, those who (are expected to) input data are best suited to give requirements on how the system will need to work (drives adoption)
  - Who consumes data will then add and refine requirements
- Finally at least one line manager and/or some C-level execs to ensure the consultancy firm designed processes that are aligned with the company/team's objectives

PROCESS MAPPING

Whoever manages the consulting firm should ensure that

- there’s a clear, agreed list of requirements and their priorities (A-B-C + wishlist)
- the key stakeholders understand what goes in each of the work packages
- even requirements that won’t be implemented are documented (with reasons)

PROCESS MAPPING

If you are not familiar with how to map processes, there's a whole section around the topic **HERE.**

PERFECT FOR THESE USE CASES

- Find inefficiencies in teams or activities within a company
- Identifying mistakes, blockers or bottlenecks in a process (e.g. ISO9001)
- Want to replicate best practices or "modus operandi" somewhere else
- Want to understand what happens in a given business process
- Need to rollout a new CRM/ERP/tool

Process

WHAT TO EXPECT

01 **THE FRAMEWORK**
How to organise yourself for the best results

02 **PROCESS DESCRIPTION**
How do you describe a process besides a flowchart

03 **PREP-WORK**
Set the stage depending on your final goal

04 **PROCESS MAPPING**
What to map and how - tools, tricks and more

05 **SCENARIOS**
We mapped a process, what's next?

02.

STAKEHOLDERS

Who to involve and how,
for a successful outcome

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STAKEHOLDERS

CommonQuestions™ - Some of the most common misunderstandings during CRM rollouts.

We've clearly identified Marketing and Sales as stakeholders but at what point should we get Logistics / Finance / Legal etc involved? How?

Don't stop at departments - the departments/teams are not your stakeholders.

A stakeholder in this project is any individual who will:

- Use the system by producing or consuming information
- Be impacted by the system (e.g. IT department)
- Will be involved indirectly (e.g. potentially HR)
- Is a sponsor (e.g. C-level suite)

STAKEHOLDERS

How to map stakeholders

Note: You can take a first attempt individually, and then adapt the map as you progress.

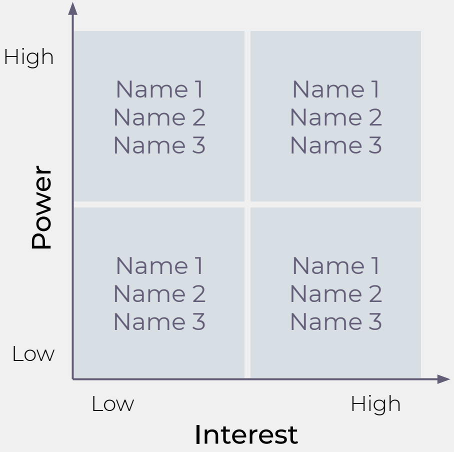
Goal

Identify who are your stakeholder, and cluster them into 4 groups, to map:

- Influence of the person on the project/other stakeholders
- Propensity towards the project

These will most likely be in different departments and positions within the organisation.

The result of this exercise will drive the level of involvement and the effort on communication with each group (or person!) throughout the project.

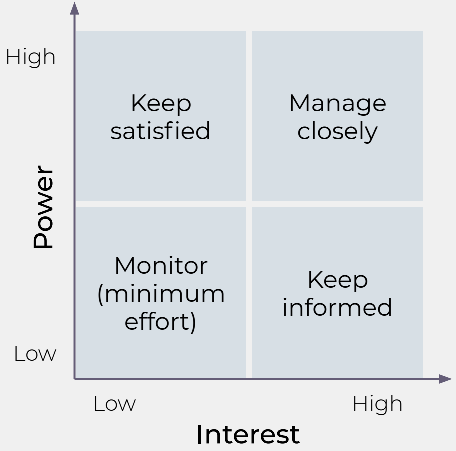


STAKEHOLDERS

Methodology

For each person assign a number from 1 to 4 for both influence and propensity

- Start from a group - e.g. Sales - can you cluster them all together?
    - First, **interest**
        - Do you think they will ALL receive the new CRM positively?
        - If not, who will be against? → treat them as individual cases
        - Anybody who is particularly engaged/excited? → treat them as individual cases
        - Everybody else can be grouped
    - Then **power**
        - Who are the most influencing individuals?
        - Who are the “followers”?
        - Cluster them with the same scale as you did before
- Proceed to the next group



STAKEHOLDERS: WORKSHOP(S)

Why do you need a workshop?

- You finally have a clear picture in mind, but need a final, aligned decision on certain topics (e.g. you need to agree with marketing and sales about lead handover)
- There may be areas or decisions where you seem to be at an impasse (e.g. two seniors disagreeing)
- It's a good opportunity to gather details around functionalities, requirements and priorities

Why would you want a workshop?

- It's a good forum for broad communication
- It provides alignment
- It makes stakeholders feel empowered

STAKEHOLDERS: WORKSHOP(S)

Workshops suggestions

People

- Involve stakeholders classified as
    - High Power,
    - High Interest, and
    - High Power / High Interest.

Topics

- Plan ahead and include topics that are relevant to all, whenever possible
- It’s fine (expected!) to have controversial topics, so prepare for them
    - Notify key stakeholders in advance, if possible/foreseeable
    - Consider working in groups (even if the workshop is <10ppl), often smaller discussions bring even the most stubborn to accept compromises

Meeting

- Have a strong moderator who’s above parties (not by rank, but by interest/bias)
- Keep them dynamic - not too long, not too much sitting time, meaningful discussions that interest people, laptops packed away

STAKEHOLDERS: WORKSHOP(S)

Use a workshop to

- Communicate how things will be done - bring clarity beyond everyone's process (e.g. marketing creates leads in a way that sales can then effectively use)
- Discuss points of disagreement
- Take decisions - taking even small decisions drives alignment and agreement - e.g.
  - Launch date (e.g. you identify it will be in Feb, can we make it by the 14?)
  - Do we need to log every phone call? Do we need a template for this?
  - Do we train everyone in creating reports or nominate one/two local champions that support these efforts?

This sounds obvious BUT

- The workshop is usually done after the requirements are gathered and worked on
- In reality, you most likely have enough material to take decisions already
- Remember not one of your stakeholders will have the "complete picture" of the project
- ...even if they think they do, it's likely they will have "their own understanding" of it

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03.

COMMUNICATION

The most powerful
tool in your belt

COMMUNICATION

CommonQuestions™

Without buy-in, "Noticeboard" type communications get ignored. Even emails and "Push" communications do. What is the most effective way to communicate?

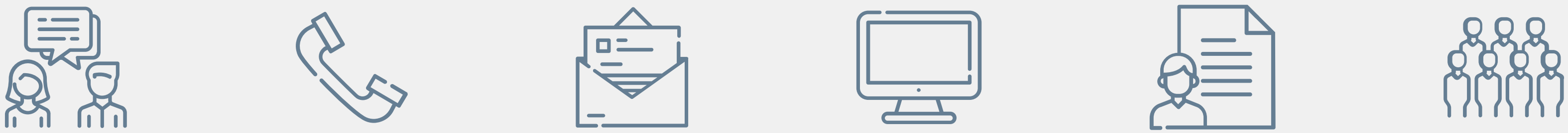
Surprise, surprise! The answer is - there is no single effective way.
(And there's work to be done here, too.)

COMMUNICATION

Forms of communication

Communication in these type of projects come in many forms:

- newsletters
- intranet announcement
- 1:1 emails
- meetings (as a group or 1:1)
- phone calls
- printed material
- word of mouth



COMMUNICATION

Approach

There is no one-size-fits-all solutions that works better than other. Some guidelines:

- Adapt the means of communication to your stakeholders
    - Highly influential/interested sales reps on the road?
      Create messages through a mean they use often - e.g. emails
    - Stakeholders in the “Manage closely” quadrant?
      Go the extra step and deliver them news before everybody else, or through a more “personalised” channel (e.g. go for a coffee)
    - Big cluster of stakeholders?
      Create a newsletter with all decisions, regular updates, etc.
- Create “evangelists” - people that you keep WELL informed, and that can spread the right messages on your behalf; these act as multipliers of your voice
- Settle rumors and “unwanted gossip” as they arise - clarify and “spread the word”

HINT Consider using “tangible” forms of communication. E.g. printing a small (A5) carton leaflet with information such as who to go to for X, Y, Z (w/ phone/email), important dates (e.g. workshop, training, roll out), what happens if you lose your password, how to login, etc.

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04.

TRAINING & ROLLOUT

Getting everything ready for launch day

TRAINING

Things to consider

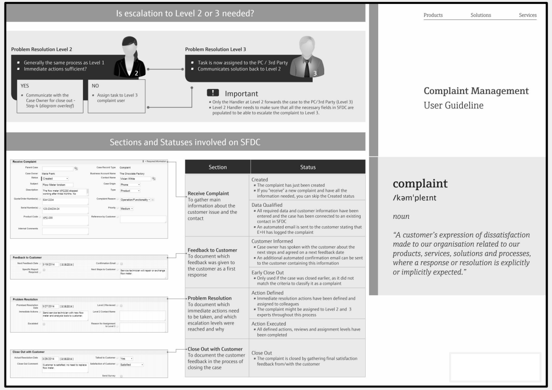
- Not everyone needs to know everything - keep it meaningful
- Make it interactive
  - Create customers, contacts, opportunities
  - Create data that someone else will consume
  - Talk with each other through the system (wall posts / Chatter / etc.)
  - Create a report for each other - or something that they will use themselves in the future (e.g. to follow up opportunities)
- Use the real system configuration (e.g opportunity stages, integrations with other systems/ERPs, etc.)
- Consider making smaller groups, if sessions have more than e.g. 5-10 participants

HINT Having someone of the key stakeholders being trained on certain aspects (specialist, e.g. on reporting) or on all training material (train-the-trainer concept) can be a good motivation to boost their propensity towards the project and offload some activities, building competences in-house.

TRAINING

Training does not stop in the classroom

- Follow up with a questionnaire a few days (a week or two?) after the classroom training, to understand if anyone needs more clarification on something
- Make sure the system is launched immediately after the training
- Make yourself (or the trainer, if you went for a train-the-trainer approach) available at all times for questions, especially in the first month or so
- Create customised material - I can't recommend this enough! People tend to google things, don't give them a reason to.



HINT Publish and curate the material you create. Have a "central library" (e.g. in the company intranet / shared drive) where users can refer to procedures, instructions, even links to pre-built reports can be extremely useful not just for adoption, but for continuous engagement and quality of data.

ROLLOUT

CommonQuestions™

Can this work with Zoom / Teams? Or would you suggest this needs to be in person? Any strategies / suggestions on remote rollout given the current times?

Yes, it could work. But people tend to do something in parallel to online meetings. (This statement reaches high levels of probability if their webcam is turned off.)

Let’s state the obvious

People are more engaged when they have someone talking to them in person.

Hence, if you’re back in the office and it’s safe to do so, I strongly suggest to do this in person.

ROLLOUT

Activities on/prior rollout day

- Issuing logins → have a single point of contact if someone needs to ask / gets locked out
- Answer questions quickly
  - If someone doesn't get used to the process or buys in, they will be keep doing "the old thing"
  - If "the old thing" still works (and it most likely will) they will become even more reluctant to change
  - Consider shadowing some users and do things together a few times
- Consider having people who can support you in the activities above, especially for big groups

05.

MEASUREMENT

You can’t control what you don’t measure

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MEASUREMENT - APPROACHES

Implementation metrics

- These refer strictly to the success of the implementation - whether users accepted the change, how are they using the system, etc.

- I would consider holding your consultants accountable to some of them, too.

Business metrics

- These ensure that users keep using the system and that the benefits that it brings translate into business benefits

- They would be the basis to justify and evaluate if the project was successful and impactful (e.g. ROI)

MEASUREMENT - EXAMPLES

Implementation metrics

- Adoption rate
- Records with mistakes
- ERP records without CRM information (e.g. opportunities)
- Daily logins
- Users who did not log in for x days
- Average system interactions per user (adding/modifying records)

Business metrics

- Increase in sales / opportunity values / number of visits/calls / etc.
- Quality of the sales forecast
- Speed of decision making
- Time to quote / to order
- Win rate

HINT These could also be compared to a current CRM implementation, if upgrading systems.

THANKS!

Do you have any questions?

Please reach out!
(I also love feedback!)

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mza.is/lis - or search for
“Marco Zanzotera” on LinkedIn

SPECIAL THANKS & CREDITS

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