

Strategies for a Successful OnContact CRM Implementation

Keys to OnContact CRM Implementation Success

Let's face it, change is hard. Implementing a new software system changes things: work habits, what people have to know, how people interact, who controls information, and accountabilities, among other things. You are undertaking this project because you believe this will be a change for the better for your organization as a whole. In the final analysis, however, the system **will only be successful if it is fully accepted by your CRM users**. Here are some recommendations to ensure success:

Executive Sponsorship

Involve a senior executive who is committed to the project! Make sure they stay informed and have the authority to clear roadblocks, allocate resources, manage any negativity and promote enthusiasm for the system. They should ideally have the power to require people to use the system rather than 'old' methods they may be more comfortable with.

Project Manager

Assign a strong Project Manager. Ideally, someone with a background in Sales, Marketing, or Customer Service. This person should also understand your business, and your internal business processes-or, have access to someone who does.

Form a Core Team

Identify a few key people to include in the project. If possible, a representative from each involved department (Sales, Customer Service, Marketing) should be included. Give them the time and authority to complete project tasks, and make sure all team members are committed to the project's success.

A key member of this team is your Project Manager. The Project Manager should be a person from your company designated as the leader of the implementation effort. This person should be in a position in your company that will enable him or her to assemble the internal resources necessary to complete the project. He/she should also understand your internal business processes well – or, be working with members of the team who do.

The project team should also contain representatives from the areas using the software. They will need to speak for their group's needs and champion the product to their group. Finally, you should include the designated OnContact CRM software administrator. The Project team will be involved in designing how users will conduct their work on the system. This may dictate changes in procedures or changes in the software or both. Finally, the team will participate in the Model Office Review to validate that all is in order for rollout.

Work with OnContact Consultant

Trying to implement a new system without the expertise of a consultant is a daunting task – and usually leads to an unsuccessful result in the end. We are committed to understanding your

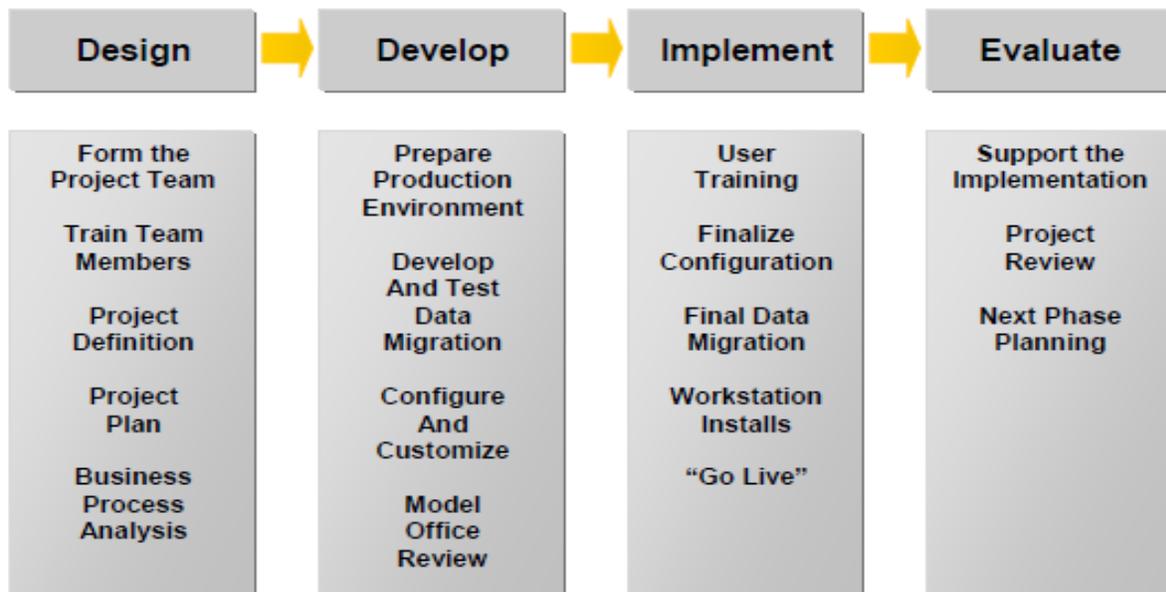
business, and recommending the best approach for setting up and using OnContact to accomplish your goals. In addition to training your core team, we can advise you throughout the process of setting up your database, importing data from other systems, and testing results.

Phased Approach

Don't bite off more than you can chew...a phased approach is not only easier to implement, it allows users to be introduced to OnContact at a manageable rate. If you overwhelm them, they are more likely to stop using it-or, use it incorrectly. Identify your short term goals and users for each phase, and make sure you can measure results for each phase to determine when it is accomplished.

Sample Implementation Path

The implementation path is the broad overview of how the implementation should progress. The details of each step in the path are to be found in the next section. The diagram below offers a simple view of the progress through an implementation.



Design Phase

It is important for you to realize that what you are embarking on is a project. You have made a decision to automate portions of your business with OnContact CRM. This is a serious undertaking that will require planning and decision-making. Therefore, you must assemble a project team.

Train, Train, Train

Every one of the people involved with this project will need to be trained. The project team should be trained **before** they make decisions about the implementation. And, all Users should receive training that focusses on how the product works, and how to perform your company specific tasks (i.e. processes).

Project Definition

Here are a few questions your project team should answer before moving forward:

1. What group or groups will benefit from this software?
2. You have chosen to purchase OnContact CRM, but do you know why?
3. Can you define who will benefit from the package? If the answer is your customers, then you should define what benefits you feel they should receive. If it is your sales staff, then be prepared to tell them what they are going to get out of using the software. For whatever group or groups receive benefits from OnContact CRM, you should be able to state what the benefits are and be able to support them through the implementation.
4. How will you know when you have a successful implementation? As simple as this sounds, it is often difficult to document. Very simply, complete this sentence: We will know we have a successful implementation when _____. This is not a single sentence with one definition of success. Success will be determined by multiple components. Make sure that some of these statements are objectively measurable.
5. What are your short term objectives? WorkWise always recommends that OnContact CRM be implemented in phases. Choose the first business process to be automated in OnContact CRM.
6. What are your long-term objectives? List one or more long-term objectives in the order you wish to accomplish them. These will be the later stages of the implementation.
7. What risks and constraints are you facing? You should list those items that constitute a risk to the success of the operation and additionally identify actions that can be taken to minimize the risk. Also list the constraints that may guide your decision-making. Typical constraints include the expected go-live date, the project budget and the availability of resources.
8. Be aware of the “triple constraint” that exists in almost every project. The “triple constraint” consists of Time – Resources – Capability. The reason it is defined as a triple constraint is that in any project all three of these cannot be fixed. If one changes—the others will most likely change also. If you set the end date and the capability (features) in stone—then resources will need to be flexible to deal with unexpected delays or complexity. If the resources and end date are fixed—then the capability will need to be flexible (changed).
9. What is the scope of the project? Defining the scope of the project at the highest level means listing those major tasks that will need to be performed during the implementation.

Project Plan

Once you have determined the goals and scope of your OnContact CRM project, you are ready to build the Project Plan. The plan reiterates the goals and scope and then defines how implementation will occur. The plan should include a schedule. Make sure you include the trained consultant in preparing a schedule. The consultant will have insight into how long certain tasks should take and will be aware of potential road blocks to a smooth implementation. One

recommendation worth repeating: plan to roll-out the OnContact CRM project in phases. The consultant will be able to help you determine what to include in each phase. It is strongly recommended that you not attempt to roll out OnContact CRM to all types of user at the same time. Small victories can enhance uptake of OnContact CRM and should be planned throughout the implementation cycle.

Business Process Analysis

One of the most critical factors of the success of your implementation is examining those business processes that are to be automated with OnContact CRM.

Review Current Processes

If you have never documented your business processes before, you need not be intimidated by the prospect of doing so now. It may seem tedious, but hours spent in this type of analysis can prevent days or weeks of chaos and delays later in the implementation.

Our recommended approach is fairly simple. First, list the major user groups that will be making use of the software. Then, for each major group list those uses they will be making of the product. “Uses” refers to distinct activities with beginning, middle and end. Note what information must be available to move from one step to another. Examples of business processes:

- Qualifying a lead and creating a sales opportunity
- Handling an e-mail blast to customers owning a specific product
- Returning a product for refund
- Transferring product registration from one user to another
- Handling a customer inquiry concerning a shipping date
- Notifying users of a particular product of patch or fix

Map Current Processes to OnContact CRM

Your analysis will become even more granular when you test OnContact CRM against each of your procedures to determine how it will be used. When you get to that level of detail, it may be more productive to work on specific tasks offline then discuss your results as a team. Note that individual team members will need more in-depth training that they’ve received so far.

It works well for the OnContact CRM administrator to schedule some one-on-one coaching to help team members get started. Define some sample business processes and then document the best navigation path to efficiently use OnContact CRM to accomplish each process. Note any areas where there is not a “fit” or where you’re unsure how to use OnContact CRM.

Identify and Resolve Gaps

Once your team members have tested business processes against OnContact CRM, they may have identified areas where there is not a good “fit.” Individual team members from each functional area should develop their own list of observances and issues. Schedule a team meeting where everyone comes prepared with his their list. Now you can discuss whether you are going to change the process to fit OnContact CRM system or change OnContact CRM to fit the process. Where you determine you will change OnContact CRM, you need to add that item to the list of requirements for customization.

Document Business Processes

The business process documentation has been evolving from the initial planning session throughout business process review and design. Finalize the documentation now so that it can form the basis of your user training materials. Where there were customizations identified as part of the gap analysis, it will form the basis for the customization requirements document.

Define your reporting needs

OnContact CRM includes numerous sample reports for managing your business. You should make a list of the critical reports that you need to run your business. Next, examine the reports that are already available in OnContact CRM and see if any are an exact or near match. For new reports examine whether the data necessary for the report is already in the database or whether additional data needs to be input in order for the data to appear in reports.

Develop Phase

Prepare Production Environment

If you will be deploying OnContact CRM On Premise on your own servers, you must check your hardware against the OnContact CRM system requirements. Make sure in advance that you have the appropriate hardware and required software.

Develop and Test Data Migration

Very few installations will begin use of a CRM system without some data import. WorkWise consultants can assist with this data import and sometimes product training includes information on data import. Whatever your legacy system, there is likely to be somewhere between a little and a lot of garbage data that will need to be cleansed.

Scrub the Data

Before anyone imports the data into OnContact CRM, the data should be thoroughly scrubbed. In other words you should search for and correct any inconsistent or erroneous data. Examples of what you might find:

- Typos in key data
- Date fields that contain non date data
- Numeric fields that contain non-numeric data
- Numeric fields that contain out of range data (data that is greater than or less than what would commonly expect to find)
- Key data fields that contain no data or insufficient data to be useful
- Out of date data (e.g., wrong company name, address, phone, area code, zip code, etc.)

Perform these checks on a sample of your data to assess the overall quality. If you are showing error rates of greater than 25% then you have identified a problem area that will need to be addressed separately from the import itself.

Optionally: Scrap the Data

In instances where the database is small and the level of garbage data is high, it may be wise to start over with only known good data.

Importing

OnContact CRM includes tools for importing data. Your OnContact CRM Administrator can be trained on how to run the standard OnContact CRM data import utilities. For more complex imports, WorkWise can help with developing enhanced data imports..

Merge Duplicate Records

In instances where data is coming from multiple sources you must make decisions about what constitutes duplicate data. Once you have identified likely duplicates you need to decide which of the duplicate records is most likely the accurate record. Your OnContact Administrator should run the Deduplication utility after each import, as well as on a routine basis as a best-practice.

Configure and Customize

No one implements a CRM system straight “out-of-the-box.” Because of that you will need to discuss about changes. Changes generally fit in two broad categories—configuration and customization.

Configuration

Configuration items are those that are handled by settings within OnContact CRM. Examples of this would be setting up users and security, identifying system defaults, tailoring field names and screens, and changing configurable business rules. Every CRM system will require some configuration. We strongly recommend that you work with your WorkWise consultant during this step.

Customization

Customizations are changes that require changes to standard code. In some cases you will be modifying existing code or you maybe adding new controls, forms or functions to the product. Your WorkWise consultant can provide you assistance in any of these areas.

Customizations should be carefully planned with WorkWise to get the most value with a reasonable investment.

Model Office Review

The Model Office Review is a major project milestone. Hold the Model Office Review after the project team has completed the system configuration and documented the business processes. If your project includes customization, then the Model Office Review should occur after the development work has been completed and tested by the team.

The purpose of the Model Office Review is to walk through the system configuration with an extended Review team to validate the team’s work and get approval to proceed with rollout. However, this should not be the first time stakeholders have been consulted about the system. Throughout the business process design phase the project team members should be in close communication with representative users in their respective functional areas. The Model Office Review is an opportunity to get the stakeholders together in one room and get buy-in and sign-off on the system. Approach it with the assumption that your configuration work is done, but be prepared for some rework based on feedback from external parties. It’s much better to catch something that the team overlooked now than in the midst of the rollout!

Use the cases and function list you developed in the business process analysis phase to provide the agenda for the Model Office Review. Provide users with the documented processes they are to accomplish and ask them to do it using OnContact CRM. Watch how they navigate the system and note where it is particularly difficult to move from one step in the process to the next. Those are areas that may warrant customization or additional documentation.

You need to make sure all user groups can satisfactorily execute their tasks on the system. Record the findings from the Model Office Review and determine your recommendations for changes to OnContact CRM or to your processes. Then estimate the amount of time and effort it will take to make each recommended change. The project team will then need to prioritize the list. The expectation is that you'll have more recommendations than time and resources. The triple constraint applies here and you will probably defer some of your recommendations to a later phase of implementation.

You will then make the changes agreed upon by the project team. After completion of the changes you may want to run the Model Office Review again. This will ensure that the changes made achieve the desired results. Your test users will appreciate seeing improvements in the application and process and can become champions for using the software later.

Make sure you allocate time in your project plan for making changes based on the Model Office Review. Skipping this step and not allowing users to provide feedback will greatly reduce the acceptance of the software.

Finalize Business Process Documentation

Based on the feedback received during the Model Office Review, revise and finalize the business process documentation. It's a good idea to circulate it to department heads and key executives for signatures. You are going to need their support while end-users adjust to the new system. Remember, change is hard and you can expect at least some resistance from end-users.

Implementation Phase

User Training

As mentioned earlier, training is one of the most important keys to implementation success. But often it is an afterthought and some look at implementation success as being achieved when the software is installed.

Do not assume that what appears to be intuitive to you will be so from the user's perspective. Be especially careful when dealing with groups who have never used an automated product or with groups who have become accustomed to other applications that are less full-featured than OnContact CRM. A good rule of thumb is to train as though your business depended on it...it does! Given that level of seriousness, here are offer some general rules to guide your training success.

Train to your processes

A popular concept in the computing world currently is "use cases." At their simplest, use cases are merely the documenting of how systems will be used. Earlier in the Implementation you

were asked to define your business processes, these are the use cases of your business. Use this same list to derive your training objectives.

For example, one use case might be a customer call to return merchandise and cross ship a replacement. In this case you would work through the steps in OnContact CRM and ensure that students saw a demonstration of this in instruction and later had an opportunity to practice this on the software.

Some other examples of use cases are:

- Customer calls requesting additional documentation
- Sales request for system requirements
- A support issue emerges in a sales call to a current customer
- A customer calls to request an invoice to extend their service agreement
- A customer calls and indicates they have merged with another company
- A prospect calls your general number to ask for information about your product
- You receive a stack of business cards from a tradeshow
- A customer is dissatisfied with your response to a support call and asks to have the call escalated

The mission of the training is to provide a preferred means for your company to accomplish these tasks in the software.

Put your team through rehearsals

Much like performers in a play, rehearse your team's performance with the software before it “opens” in your business. In other words, any training that you do should have practice that mimics planned use of the product. Such rehearsal will invariably uncover areas that need clarification or additional documentation and procedures. Once your team has practiced their jobs on the software in the more forgiving atmosphere of the classroom they will be ready for their real performance on the job.

Take the time to do it right

The biggest excuse we hear when it comes to training is that no one has time. Sales people are too busy chasing leads, support people are too busy taking calls, and marketing people are too busy creating and executing programs. Without appropriate training you jeopardize the whole implementation effort. Failure in the area of training will often put you into a situation from which you will be unable to recover. A few hours of time devoted to training prior to implementation will save hundreds of times its value in lost time later.

Keep training

In the days, months, weeks and years following implementation your staff will change, but your need for training will not. Ensure that your training for new employees or those new to the tasks are as vigorous as the training you offered at the beginning.

Who will do the training?

An obvious question is, “who is going to do this training.” There are several possible answers. First, you must realize that at least part of the training development will be your responsibility as

you understand what you are trying to accomplish with the implementation of the software and you understand the processes of your company in conducting its business.

You can contract with WorkWise to have a professional trainer conduct training. Keep in mind that the professional trainer will still need to know enough about your business to mold the training to your needs.

A third option is to work jointly with WorkWise to present the training. Your trainer can address those issues and processes that are company specific we can address the general and technical issues.

Who needs to be trained?

The answer is: everyone who will use the software, although not everyone needs the same training.

If you are implementing complete full CRM package, end-user training should be subdivided based on user type. Users who will interact with certain parts of the system can be trained together. Users should be trained on the processes and features that help them accomplish their job function.

Keep in mind that your OnContact CRM system is a powerful tool that has all the facility to take your business to new levels of efficiency, but only if people know how to use it.

Finalize Application Configuration

During the Model Office phase you may have tried multiple configurations of OnContact CRM. Having tested various options and made decisions to determine various configuration settings, you are now ready to apply those to the deployment installation. This is also the time to setup all the users of the application and configure application security for them. You should have planned and tested security during the Develop phase.

Final Data Migration

At this point, you should have migrated your data several times while in the Develop phase. All that practice has been to ensure that the cutover to OnContact CRM as the production system be as smooth as possible.

“Go Live” on Production System

The final step is to “go live” or “cut-over” into production with OnContact CRM. This may involve having users stop using legacy applications that are replaced by OnContact CRM. Companies often keep legacy applications running after introducing a replacement system, but if the old system is still available many users will not switch until forced to. Understand why training before going live is so important?

It is recommended that most users be “disconnected” from the legacy system at the point you go live. This has some risks, but if you have followed the guidelines in this document you will have mitigated most of the risk.

Evaluation Phase

Support the Implementation

As your employees begin to use the OnContact CRM—even after having been thoroughly trained—they will have questions. Be prepared to answer them. Your IT Help Desk staff should know how to answer basic questions about OnContact CRM.

Make sure your OnContact CRM administrator has time to answer questions as well. This will be a busy time for them, so it is important to consider the end-users as “customers” of the administrator. Resist the temptation to take in a bunch of “enhancement” requests in the first week or two of implementation. Often, users will ask for changes to the new system to make it look/feel/act like the legacy system you just replaced. Let your “customers” become familiar with the system and acclimate before taking enhancement requests.

Monitor and Feedback

As you roll the system out to new users, do some spot-checking. Are they actually logging in and maintaining Activities, Opportunities etc? Are they updating the records accurately and completely? Are they following up on their assigned Activities? Provide feedback to them, and correct as you go.

Project Review

It important to do an end of project review to review lessons learned, reinforce good processes, and stop doing things that don't work. This is often called a “post-mortem” meeting—or if you feel like the project isn't “deceased” but has in fact just been born a “post-partum” meeting. Whatever you choose to call it, this meeting should acknowledge that you are not done with the OnContact CRM implementation—that over time you will continue to change and mold OnContact CRM to meet your business needs.

Next Phase Planning

After the “post-mortem” meeting has occurred it is time to start planning the next phase. It is likely that you did not make every change recommended during the Model Office Review implementation and some of those suggestions were quite good. It is time to start thinking about additional changes to the system—particularly changes that can provide your company with a competitive advantage.

The process you used in the Model Office Review should continue to be used on new suggestions. You should be working to ensure that changes to benefit one set of users do not cause problems for another set of users.

Remember that CRM is primarily about people and processes, not technology. While you now have the technology in place to improve customer satisfaction and loyalty, reach more prospects and increase revenue—the people and the processes will likely continue to change over time. The truth is that you are never really “done” with CRM.

Conclusion

Thank you for taking time to read this paper. We hope it will enable you to successfully undertake your OnContact CRM project that will transform your company and its relationships with customers.