

Effective planning for your CRM   
implementation or conversion project

Questions? Call 800-988-8850

Before You Invest in CRM Software

Assess Your Needs and Create a Plan

When carefully examined, there’s a direct relationship between customer experience, customer feedback, and financial performance. Some models and measures can be instituted to track how much you’re profiting from these initiatives. This not only embodies Cool Life CRM’s philosophy, but we anticipate it will be reflective of your organization as well.

The goal of this process is to create a map for a successful implementation that will come in on time, under budget and without disruption to your organizations’ regular business. The following steps will help in this exercise.

STEP I

Overview of the points you will need to address are;  
 1. Determine the goal of your CRM implementation.

2. List your organization’s problem areas that you want to address.

3. How much does the problem area cost your organization?

4. Are opportunities being lost or potentially never being discovered?

5. Are your users savvy with technologies?

6. CRM features and capabilities your process seeks to accomplish should fit into one of three categories; “Needs” - are those features you are non-negotiable. “Want” are functions that would clinch a decision on a platform, and “Nice to have” are those features and capabilities that you would be nice to have, but not required scope, and would be viewed as a bonus that exceeds the plan.

7. What is your timeline and who will be responsible for implementation questions and provide the resources necessary for a timely delivery.

8. List the users and responsibilities of their intended role they are to play within the CRM.

After you have addressed these questions, next should be the discussion of where your organization is today, where you see the change will improve outcomes, and how this fits your organizations' ultimate long-term goals.

STEP II

Discover the details necessary for effective CRM discussions. Understanding the current data environment is how you store and utilize your contacts, history, and associated sales pipeline.

Describe your current environment: (examples – a contact manager or CRM, excel documents, outlook or any other methods)

1. Do you currently have a CRM?
2. When did you last address your data and process?
3. Does your organization require improving your revenue activities?
4. How will you measure your ROI?

The primary cause(s) that need to be addressed requiring your need for implementation of a full CRM. (circle those areas that apply)

|  |  |  |
| --- | --- | --- |
| Data Visibility | Data Cleaning | Outlook Integration |
| Notes | Mobile access | Customer Life Cycle |
| Cross-Selling | Email Marketing | Future Growth |
| Pipeline | Reporting | Project Management |

Comments and additional detail:

STEP III

Create a list of features and functions, allowing you to compare CRM applications. Some areas to consider tracking product capabilities for evaluation;

Mobile App

Administrative Features

User Manager

Database Control

Permissions

Outlook /IMAP Integration

Analytics

Reporting

Collaboration

Customer Service

Marketing Automation

Productivity

Pipeline

Sales Automation

Third-Party Integrations

Public / extra-net web

Fee Structure / per seat

Monthly or annual payment

Implementation Costs

Data Migration

Project Management

Security

Compliance

STEP IV

­­­­After completing and reviewing all competing CRM’s, it is time for selecting a vendor. For effective evaluation, here are questions that you should address before awarding your business to a CRM company.

1. Security and compliance are vital to protect your company process and data.
   1. Do you require HIPPA or FINRA compliance?
   2. Data encryption method & policy
   3. Disaster recovery and SLA (Service Level Agreement)
   4. Log-in flexibility requirements and restrictions
   5. Export of data
2. Will our organization have a dedicated account rep?
   1. What is the response time?
   2. Where is the call center located? The US or abroad
   3. What is the “self-service” ability?
3. References are important. Speaking with and organization similar in size and industry can prove to be most valuable.
   1. Length of customer relationship
   2. Best experience
   3. Challenges
4. Database management can be a challenge absent the knowledge or resources to improve, edit and add to your database
   1. Is the database shared with any other customer?
   2. Will the changes be manageable internally or if needed, by the vendor?
   3. Who owns and may access the data?
5. What are the expectations of a timely delivery?
6. Do you provide a published API?
7. Cost detail to include not just direct costs, but costs that you may incur. An example is, will a third-party service provider be required, such as an IT consultant?
   1. Implementation costs
   2. Monthly costs
   3. Data migration
   4. Training
   5. Service
   6. Email marketing
   7. Additional fees