

Strategy Is Key To Extracting Value: CRM Implementations



CRM Implementation Strategy As A Differentiator

Software platforms of the past were fixed in their capabilities and uses. Today's software platforms offer a cache of built-in and customizable capabilities. As our clients approach their CRM systems, they are typically not fully aware of existing workflows, technology capabilities, and best practices, and they are often undecided about customization of software platforms to best meet their needs. Struggling between when to hold on to an existing way of doing things and when to adopt new practices is a legitimate concern. For us, all CRM implementations follow a distinct roadmap that addresses these questions and concerns as part of a deliberate journey. Implementation of software platforms can be a clear differentiator for organizations today – improving their competitive advantages and efficiencies. Designing and implementing software is tricky, but done right, will provide exceptional value in the long run.

CRM implementations should follow a path that will trigger it to thrive in its unique organizational setting rather than be a forced solution for companies to adopt. To ensure this happens, we approach CRM implementations using the following model:

Business Readiness

Taking a proactive approach, we help businesses investigate and design processes that support business values and future objectives, recognize problems in current and previous stages, and develop solutions with cross-functional teams to create workflows that will be adopted.

Strategy

General: Many businesses use knee-jerk or break-fix approaches to design and implement systems. Our strategy is to develop a holistic view of the purpose and uses of either Salesforce or Dynamics. We look at information, leads, or activities that need to be tracked – person to person, marketing to sales, sales to back office – and create strategies that are intended to penetrate.

Rollout: Along with developing a general CRM strategy, we also focus on a rollout strategy that manages expectations and delivers on-time. We work with IT and Sales/Marketing individuals to define roles, responsibilities, and milestones. The result is a comprehensive view on ‘what to expect’ during a Salesforce or Dynamics integration and implementation.

Functional Framework

Workflow: The workflow component of a proof-of-concept shows feasibility and demonstrates that full-scale implementation of the CRM platform will, in fact, deliver on strategic intent. In this phase, we reveal a detailed picture of what final implementation will look like, including information transfer and accountability, and work towards securing feedback and acceptance from future users of Salesforce or Dynamics.

Data: We also invest time in developing data migration tools and structures for legacy or current systems, and overall data models to integrate Salesforce in an organization’s technology ecosystem. This is a critical step in determining feasibility and connectivity.

Implementation and Roll-Out

This process generally follows the software implementation plan as determined during the strategy phase. We engage with either Salesforce or Microsoft and work with specialists who have defined checklists and quality assurance metrics. Our agile deployment methodologies include daily touchpoints with our clients.

Post Implementation Management

We set up feedback loops to identify sources of error, user resistance, bottlenecks, and other general challenges. We continuously work with project team leaders and management to drive change management, but more importantly, to improve the system and its uses. Additionally, we provide on demand, general, and one-on-one training to all employees who should know how the system works and how they add value to the overarching architecture.

PROVIDING VALUE

IMPLEMENTING SALESFORCE OR DYNAMICS DOES NOT MAKE CRM BETTER. IN FACT, IF IMPLEMENTED INCORRECTLY, IT WOULD BE A CHALLENGE AND A DISTRACTION.

OUR GOAL IS TO MAKE THE PROCESS WORK SMOOTHLY FOR OUR CLIENTS – AND WE STRUCTURE THE PROCESS TO PROVIDE VALUE IN A SYSTEMATIC, BITE-SIZED APPROACH.

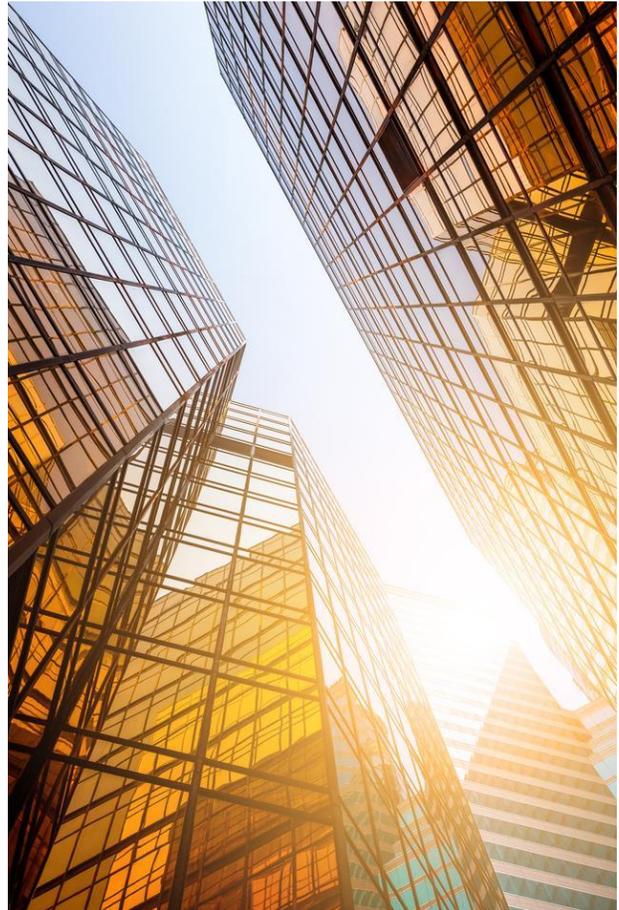
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