Implementation Guide for “Your New” CRM Sales Software System

Professional Services Project Guide

Submitted By: CRM Sales Software Professional Service Group
Working with: Enterprise Exchange Systems

What you need to sell.™

SALES LOGIX

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Introduction

The purpose of the ***CRM Sales Software Professional Services Project Guide*** is to provide you with the information you need to prepare for the project of implementing your CRM Sales Software system with our CRM Sales Software Professional Services Group.

Contained within this guide you will find information regarding the planning of your project. This includes the project team structure, planning and reporting on your project, the project implementation plan, and the CRM Sales Software Professional Services project methodology.

In addition, a section of the ***CRM Sales Software Professional Services Project Guide*** is dedicated to preparing your project team for your Project Kick-Off. This section provides you with the background and importance of requirements analysis. We have also provided you with instructions on how to prepare your business process information to make the most out of your Project Kick-Off with your CRM Project Team and get your project off to a running start.

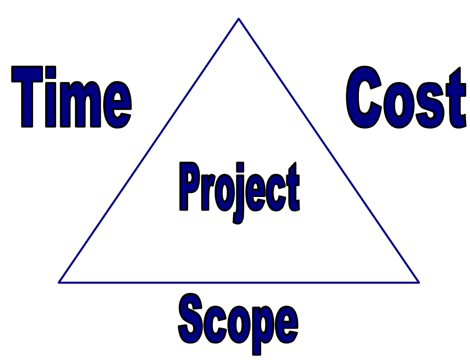
Proper planning is essential to the success of our partnership. The CRM Sales Software Professional Services Team at “CRM Implementation Team” utilizes our ***Rapid Process Methodology, RPM™***, created to ensure not only rapid implementation but also effective resource planning and communication. The end result provides you with an implementation plan where together we can achieve the following:

We have also included a section on the training courses that are available for your team throughout your project kick-off, design and implementation, and your final rollout.

The “CRM Implementation Teams” CRM Sales Software Professional Services Group is looking forward to your Project Kick-Off. We are confident that by following the recommendations provided in this guide you will be well prepared for the launch of a successful CRM system implementation.

The following factors will help guarantee project success measured by all of these criteria:

1. *A clear, written, and agreed to statement of the project’s scope and requirements*
2. *Ongoing participation in the project by the project sponsor, clients, and team*
3. *Realistic project time and cost estimates*
4. *Ongoing scope management and quality control involvement by project sponsor*



Scope Creep is a continual addition to unplanned ***Time*** and ***Cost***.

Project Scope Statement & Resource Planning

Successful project scope statement

For a project to become a success, the project team members must agree on a concise project scope statement. The project team needs to understand what they are doing and why. Team purposes and goals must be clearly linked to larger organizational missions, goals, and strategies that deliver added value to customers and to the operations of the organization. Team goals should be focused and have a workable scope. Since people tend to resist being changed, any organizational change is a campaign for their hearts as well as their minds. Even when there is a lot of detailed planning and communication, very little actually happens as a result of a solely rational, logical process. Change happens because people as a group commit to it.

A project scope statement enables a team to understand their boundaries on the project, know what is and isn't within their jurisdiction, understand where the project fits in the organization's overall improvement efforts or business strategy, and have a clear idea of where they should begin. The project scope statement should be developed and communicated to the project team and the organization by the project executive management sponsor.

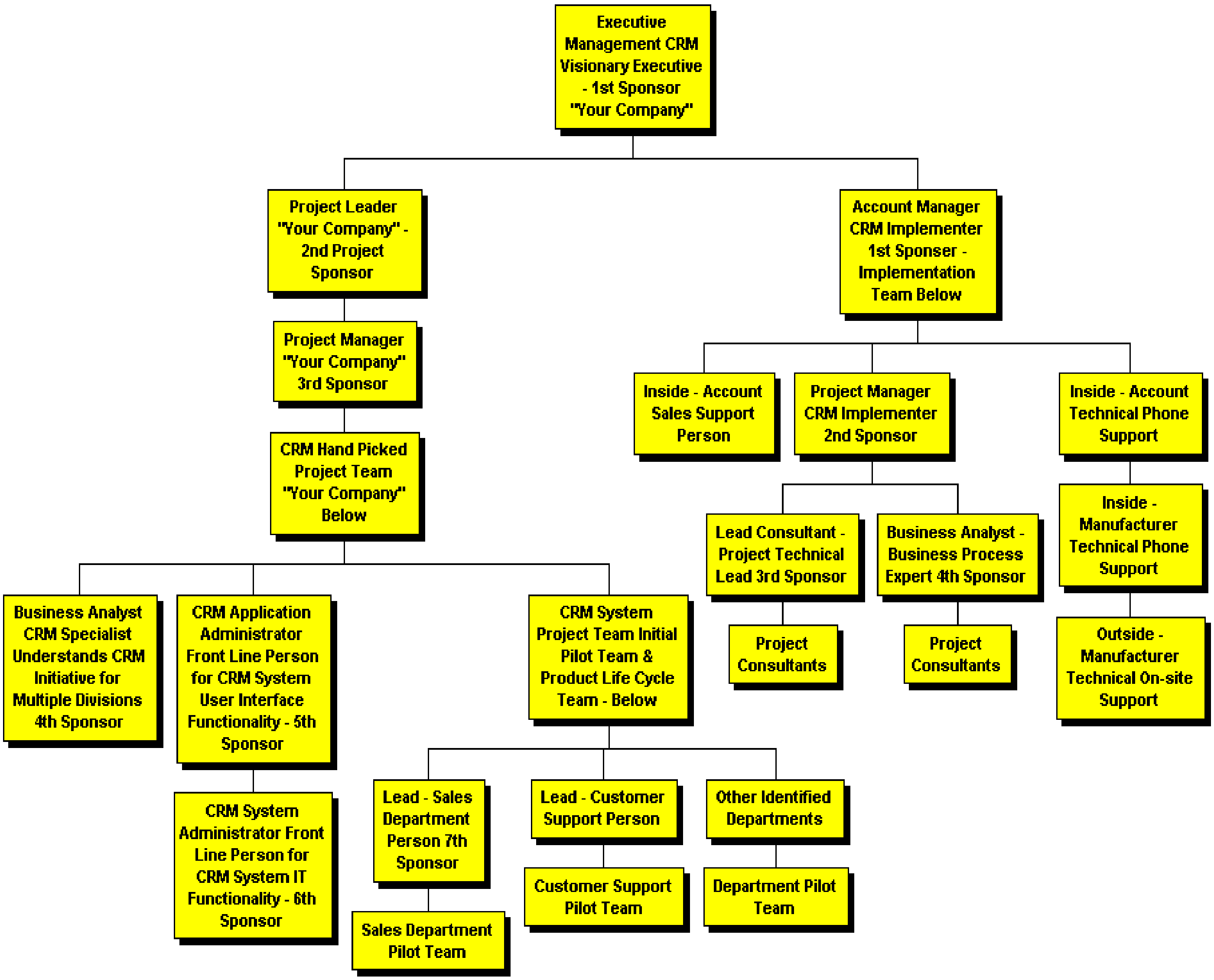
The statement should include:

- ❑ Why it is important to customers and to the organization
- ❑ What boundaries or limitations the are, including limits on time and money
- ❑ What magnitude of improvement they are expected to make
- ❑ When they are scheduled to begin the project and the target date for completion
- ❑ What authority they have to call in coworker or outside experts, request information normally inaccessible to them, and make changes to the process

Successful project staffing

The success of any project is due to the quality, experience, and commitment of the project teams. All project team members must be dedicated to the success of the project. The project members should be able to draw on their own expertise and the skills of the other team members to form a cooperative team. In selecting our project team, we choose individuals who have industry expertise, functional knowledge, implementation skills and change management capabilities. The diagram below illustrates our proposed project team. As the project needs change, the relative size of the two sub-teams may evolve. The project sponsor must be involved in the life of the project to assure time, system functionality and resource efficiency goals are met.

See Project Staffing Organizational Chart on next page



Successful Project Staffing

Your Company's Project Team

A project of this nature requires that our team and your team members work closely together to ensure that the resulting solution best meets your needs and is well understood by users of the system and your support team. We propose that you provide the following project team members:

Your Implementation Team

Executive Management Sponsor / CRM Visionary

Implementing a CRM system should follow a well thought out CRM initiative and strategy. An executive or board sponsored directive typically precedes the selection of the consulting team and software. In addition, the new system is perceived as the solution to a particular set of business challenges or pains. It is the role of the Executive Management Sponsor to communicate with the "CRM Implementation Teams" Account Executive and Your Project Team in order to ensure the CRM vision is accurately generated and business objectives are being met.

Team sponsors are playing an increasingly important role to assure team productivity and effectiveness. The sponsor helps to make sure the team is connected to the business strategy and, on occasion, runs interference for the team and represents the team to the larger organization. If you are a team sponsor, therefore, major responsibilities have been placed in your hands. It is not enough to help gather a team, support a leader to get the team rolling, and then sit back. There are a number of things you will need to do to ensure success. Most of all, you will need to monitor and support the team's progress around four particular challenges or tasks.

The Executive Sponsors role:

- Clearly understands and communicates the company's CRM strategy and vision
    - Develops the Teams Project Charter – "The Purpose of the New System"
- Creates the environment and management process for change
    - Is the Leader of the Vision and Orchestrates change management vision statements weekly
- Assures ***knowledgeable*** and empowered ***resources*** are made available in a timely manner as the project progresses
    - Generating Methods for Achieving Goals
- Assists Project Team in providing company business rules and knowledge
    - Ensures that the team's purpose and the organization's purposes are aligned

See Appendix A for a example executive initial vision statement

The team sponsor should define how the team is connected to other teams, department, and customers. It's vital for teams to know how to communicate with the organization, with whom to communicate, and how often. If the team leader is responsible for all communication with the organization, that individual must make special efforts to make sure that all necessary communication channels to the organization are open and operative. The team sponsors have the responsibility to make sure that needed skill are "on board" and that that these people have the time available to accomplish the tasks assigned within the structure of their work schedules. If vital skills are lacking, new players should be recruited or training should be provided to fill the gap.

Project Leaders role:

The Project Leader works closely with the “CRM Implementation Teams” Project Manager to ensure each task is completed properly and on schedule. If issues arise, the “CRM Implementation Teams” Project Manager and your Project Leader will discuss and mutually agree on a suitable solution.

The Project Leader is responsible for:

- Is accountable to executive leadership for successful completion of the project
- Demonstrates visible commitment to the project and process throughout project life
- Acts as the principal point of contact for the CRM Sales Software PSG Project Manager
- Can make decisions about policies relating to project organization, project scope, design requirements, or allocation of project funding
- Removes obstacles relating to critical success factors which may impact the successful outcome of the project
- Defines expectations and success indicators
- Makes timely decisions and sets priorities
- Monitors project progress and estimate
- Ensures timely resolution of issues
- Ensures alignment of IT direction and business objectives
- Assists in the development of a realistic project plan and schedule
- Prepares for, and participates in, project status meetings
- Reviews and approves project status reports and billings
- Ensures the quality of all work managed by all client project participants deliverables
- Provides all company business rules and knowledge
- Provides all company systems information and coordination
- Coordinates the training schedule to ensure that each user is available for their assigned class

Business Analyst / Departmental CRM Specialist

For each of the key functional areas within your organization — inside sales, field sales, marketing, support and operations - there ***should*** be a CRM Specialist. Each Departmental Specialist should be fully aware of the special needs and operational procedures required by their respective areas.

The Departmental Specialists are responsible for:

- Identifying the specific needs of their respective areas in the Functional Requirements
- Assisting in training the members of their departments in the use and operations of CRM Sales Software
- Testing the implementation of CRM Sales Software and the data conversion
- Prepares for and participates in design review meetings
- Prepares for and participates in project status meetings as required
- Recording issues that your team experiences with CRM Sales Software and communicating these issues in the specified format to the “CRM Implementation Teams” Project Manager

CRM Systems ongoing "Clients Support Team"

Your CRM Sales Software for Sales - Application Administrator

The CRM Sales Software for Sales Application Administrator is the sales team's primary contact person for the initial rollout and once the system has been implemented. This person should have a comprehensive understanding of your company's work process flows. This role requires a high level of involvement with the sales team and sales management and is responsible for the overall communications to the users on the CRM Sales Software implementation. This person must be proficient with CRM Sales Software as a user and an application administrator. Administrative activities include adding new users to the system; adding letters, report writing, trouble-shooting user issues and monitoring usage of the system by the sales team members.

The CRM Sales Software for Sales Application Administrator will be responsible for:

- Contacting CRM Sales Software Support with any issues that arise once the CRM Sales Software system is rolled out to your team
- Responding to inquiries from your team regarding CRM Sales Software functionality and its usage
- High level of competency using the CRM Sales Software Sales System
- Excellent communication skills
- Ability to handle multiple projects at the same time
- Strong time management
- Ability to document daily activities and duties
- Work with Sales Manager on a daily basis
- Work with Sales Personnel on a daily basis
- Understand databases and database design concepts
- Detail oriented skills mandatory
- Database set up and administration of users within the SLX system
- Ability to understand your account management sales processes
- Report writing skills, (knowledge of Crystal Reports a plus)
- Ability to work with users and answer questions on using the SLX system
- Strong computer skills, especially with Microsoft office suite
- Development of scripts and training for launch of new marketing campaigns

Estimated Weekly System Administration for a 20-user system:

During 4 to 6 week project rollout – 10 to 14 hours / week
After project rollout for weekly maintenance – 6 to 10 hours / week

Your CRM Sales Software System Administrators

The System Administrators are responsible for the related hardware and system software, such as the Microsoft NT servers. The System Administrator must have the skill sets with Microsoft NT and databases administration or attend the required courses in order to obtain these skills. The involvement of an Information Systems (IS) CRM Sales Software Professional is critical to the implementation of CRM Sales Software products. This is due to the fact that the CRM Sales Software Product Suite requires on-going network administration of the CRM Sales Software client/server application. The role of the IS contact is to manage the required network components. This individual is also responsible for any network issues that arise during implementation and thereafter. Consequently, it's important that the IS contact be proficient in the following areas:

- Implementation of the necessary hardware and system software
- Installation of the network and remote connections

- Installation and support of the CRM Sales Software database, administration tools, and development tools
- Installation and support of the CRM Sales Software application
- Data conversion
- Backup of all specified files
- Excellent communication skills
- Ability to handle multiple projects at the same time
- SQL 6.5 and above Administration experience
- Visual Basic 5.6/6.0 programming a plus
- Excellent knowledge of Relational Database Schema
- Familiarity with Crystal Reports/Crystal Info
- Extensive experience with Windows 98 / 2000 / NT
- Experience working with HTML, JavaScript, and other web technologies are also highly desirable
- Experience with Citrix, MetaFrame, or Microsoft Terminal Server a plus
- Experience with client server technology
- Internet site administration and security, including firewalls experience
- Ability to work with sales team assisting them with their projects

Interact Commerce provides special training for the System Administrator. "CRM Implementation Teams" recommends that you send at least one person to Scottsdale for System Administrator training. This is a formal hand's on training for the system administrator to have the skills necessary to understand and support the system during and after rollout.

Estimated Weekly System Administration for a 20-user system:

During 4 to 6 week project rollout – 10 to 14 hours / week

After project rollout for weekly maintenance – 2 to 3 hours / week

"Our CRM Implementation Project Team"

"CRM Implementation Teams" Project Manager,

Key to your project success and integral to our CRM Sales Software Professional Services group is project management. The Project Manager will work closely with your Project Manager and Sponsors to ensure the successful implementation of the project. The Project Manager is a true "player-coach", not merely an oversight manager and will be assigned to this project on a time basis required to meet the needs of the project.

The "CRM Implementation Teams" Project Manager is responsible for:

- Communication for the project
- Development of a realistic project plan and schedule
- Project issues identification and resolution
- Time reporting and estimate management
- Managing project deliverables and project communications
- Establishing priorities for critical project tasks
- Developing and monitoring a comprehensive work plan for the project team
- Monitoring the day-to-day progress of the project by coordinating the activities of the project resources
- Preparing for and participating in team status meetings and project reviews
- Assisting in resolving business and information systems strategy issues
- Managing internal and external risks to the project
- Ensuring the quality of all work undertaken, monitoring quality assurance and approving all deliverables
- Analyzing project progress and results
- Recommending actions and solutions to address any identified non-conformance issues, potential barriers, or potential voids
- Working with the "CRM Implementation Teams" Account Executive and your Executive Sponsor to ensure client issues and concerns are being dealt with immediately

"CRM Implementation Teams" Lead Consultant,

The Technical Lead may perform any of the roles defined for the Project Consultants. In addition, he or she works closely with the Account and Project Manager to ensure that tasks and customizations are aligned with business objectives and project milestones. This individual is responsible for the daily direction of the Project Consultants and provides technical expertise required to complete a successful implementation.

The "CRM Implementation Teams" Technical Lead is responsible for:

- Working with your "CRM Implementation Teams" Account Manager and the Project Team to develop Functional Specifications and supporting project documentation
- Assisting in resolving business and information systems strategy issues
- Functional application of the software
- Leading the modeling, design, configuration and testing of the CRM Sales Software Software products
- Coordinating user training

“CRM Implementation Teams” Project Consultants

The Project Consultants consists of both highly experienced and skilled product technicians as well as Senior Business Analysts and/or industry experts. Their responsibilities include:

- Defining business and sales processes
- Proposing re-engineering routines and practices
- Providing business process integration assistance
- Assisting in the design of the interfaces, conversions, system integrations and enhancements
- Producing project deliverables per the project work plan
- Establishing and configuring the production, development and testing environments
- Working closely with your Systems Administrators to ensure the quality of the installation, set up and maintenance of CRM Sales Software
- Supporting system test activities
- Conducting unit, system and integration testing
- Report writing
- Alert messaging integration
- Creating user manuals for user training during the rollout of your CRM system
- Training

Project resource planning and reporting

Proper planning is essential to any project of this scope. During the Project Kick-Off meeting, we identify your needs and how we plan to implement the system. We also define data conversion methods and formulate preliminary project schedules. From the information gathered in the Project Kick-Off meeting we create your Project Implementation Plan. The Project Implementation Plan is the road map that guides us through the phases of your project. The plan is modified as the project proceeds to address any requirements that are not clearly identified at the beginning of the project. Additionally, issues and risks are monitored and changes to the Project Implementation Plan are made accordingly through our change order procedure.

The schedule defined for your Project Implementation Plan is not intended to provide fixed dates for the completion of the individual tasks that comprise your project. We work closely with you to devise the tentative dates for the plan so that you may effectively schedule your staff for training, accommodate any corporate functions and holidays that fall within your project timeline, and plan for the installation of hardware and the CRM Sales Software application.

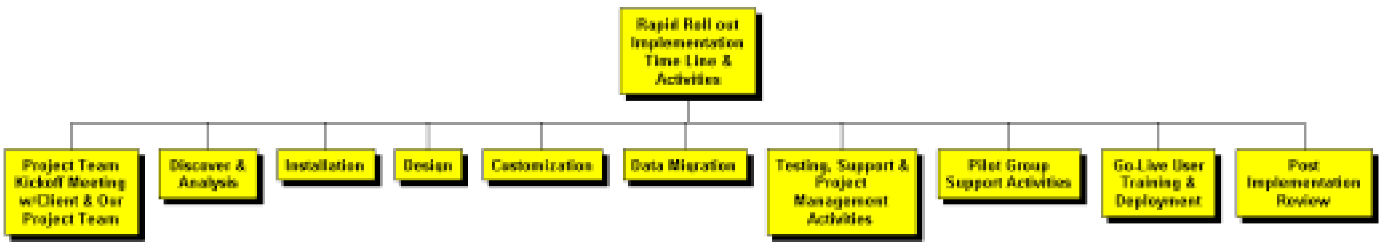
The Project Implementation Plan is maintained in CRM Sales Software Engagement Professional Services Project Module, an automated project management system. Engagement can generate current reports of all aspects of the project, track the major milestones, track schedules and delays, and identify the current critical path. Progress monitoring of the project is done through status reports, project review meetings, and informal discussions. This approach facilitates the resolution of issues and ensures that implementation efforts are conforming to the plans outlined in the planning documents.

The Project Implementation Plan achieves the following:

- Facilitates communications between the project team as well as with senior management.
- Identifies possible issues far enough in advance to take cost effective steps early on to alleviate or to eliminate the issue.
- Helps “CRM Implementation Teams” Professional Services and the customer to schedule resources efficiently and to plan around vacations, holidays and other scheduling conflicts.
- Clearly identifies the efforts required of “CRM Implementation Teams” Professional Services and your team so that it is clear who is to do each task and the degree of time and resources each task will require.

Major Project Implementation Steps

A CRM project generally follows the following major implementation steps (some may be performed in parallel):



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1. **Project Kick-off Meeting**
    a. Discuss the key business objectives to be attained through the project
    b. Discuss the project scope and phased approach
    c. Discuss and plan change management and communication for the company
    d. Define responsibilities and allocated resources
    e. Define preliminary plans and schedules
    f. Define expectations and results of a successful implementation

2. **Discovery and Analysis**
    a. Gather user requirements
    b. Document key business objectives
    c. Determine project scope and phased approach
    d. Develop High-level project plan
    e. Deliver detailed Functional Requirements
    f. Sign-off on requirement delivery

3. **Installation**
    a. Client equipment configuration review
    b. Equipment configuration recommendation
    c. Perform CRM Sales Software Database Server Installation
    d. Perform Workgroup User Installation
    e. Perform Remote User Installation
    f. Perform Alpha-Application Testing
    g. Sign-off on application delivered

4. **Design**
    a. Develop High-level system architecture
    b. Develop data model
    c. Develop prototype application view (Account, Contact, Opp, and others)
    d. Develop user security model
    e. Prototype & Document Data Conversion Mapping of Tables & Fields
    f. Sign-off on design delivery

5. **Customization**
    a. Finalize application views

b. Finalize user security model
c. Finalize custom code
d. Finalize identified reporting needs
e. Alpha test system
f. Pilot test system with client pilot team
g. Make final changes to system given pilot team feedback
h. Sign-off on customization delivery

6. Data Migration

a. Import mapping
b. Developing import scripts
c. Develop low level data cleansing / reformatting scripts
d. Perform data conversion
e. Verify data import
f. Sign-off on delivery

7. Testing

a. Beta testing of design and enhancements
b. Client pilot group testing
c. Final system testing before going live

8. Training

a. Administration training
b. Technical training
c. CRM Sales Software user training
d. Self-paced WEB based user training
e. Instructor Led-WEB based training
f. Instructor led class room training
g. Sign-off on delivery

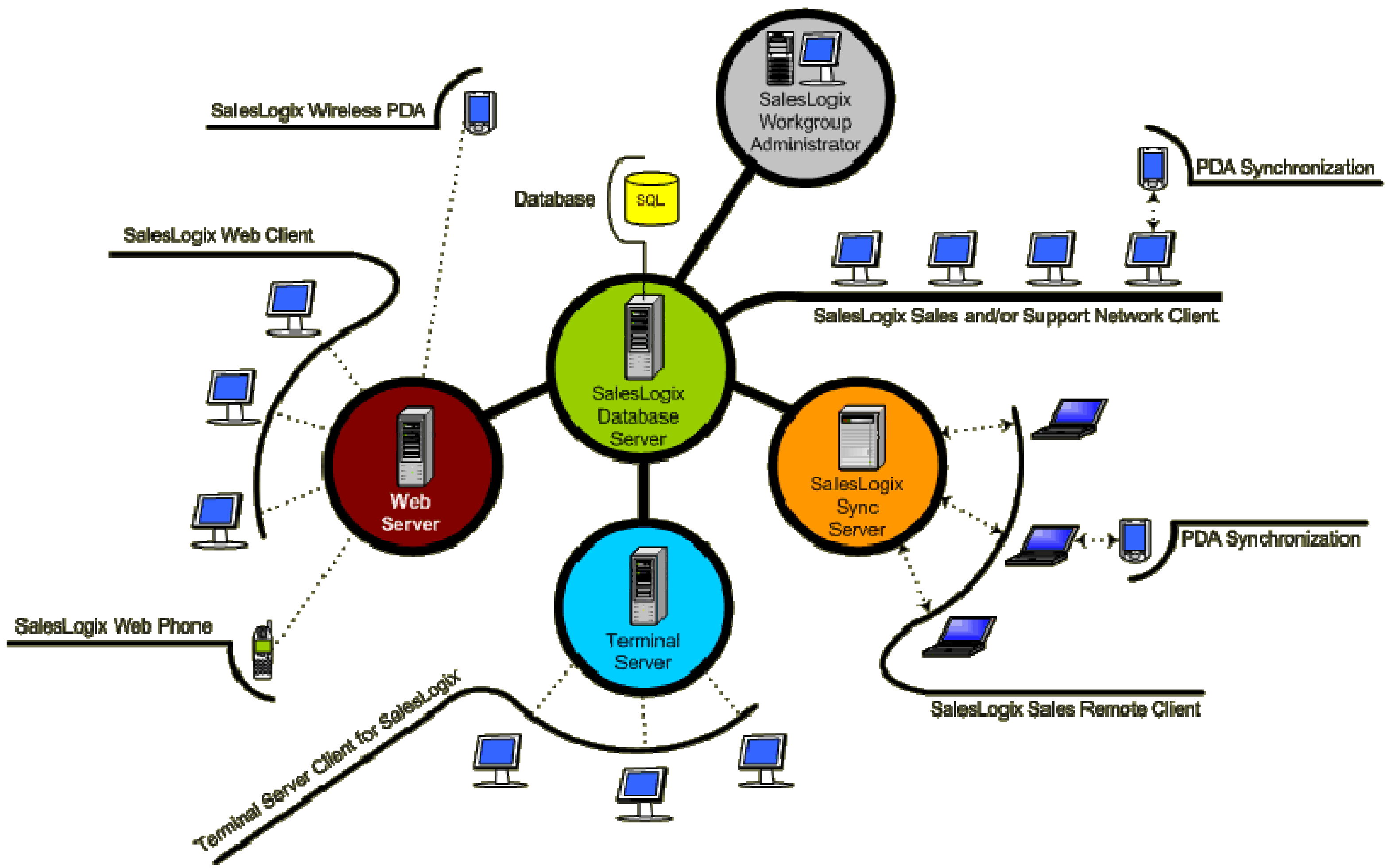
9. Go-Live

a. System has been tested
b. Customization has been completed
c. Data has been merged
d. Product has been installed on all workstations
e. Pilot group has given the system an OK to roll-out
f. Sign-off on delivery

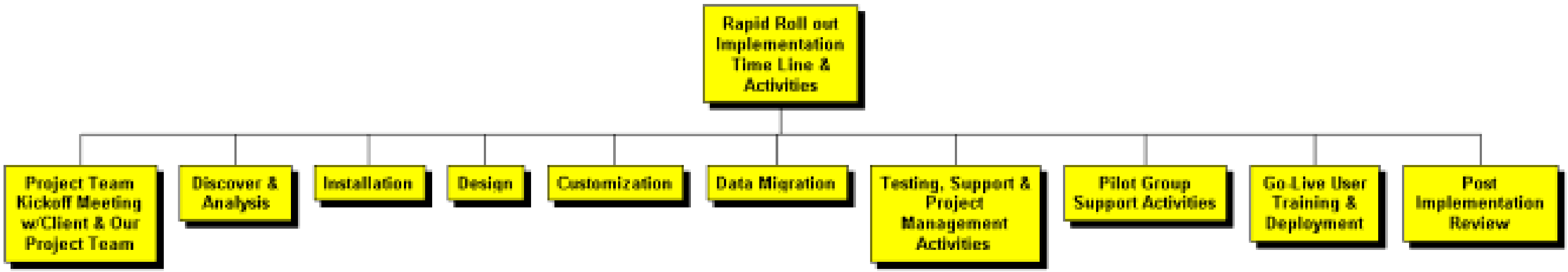
10. Post Implementation Review

a. Determine if the system is being used to its fullest advantage
b. Review if the key features being used correctly
c. Make any minor enhancements to the system give the feedback

General Overview of System Elements

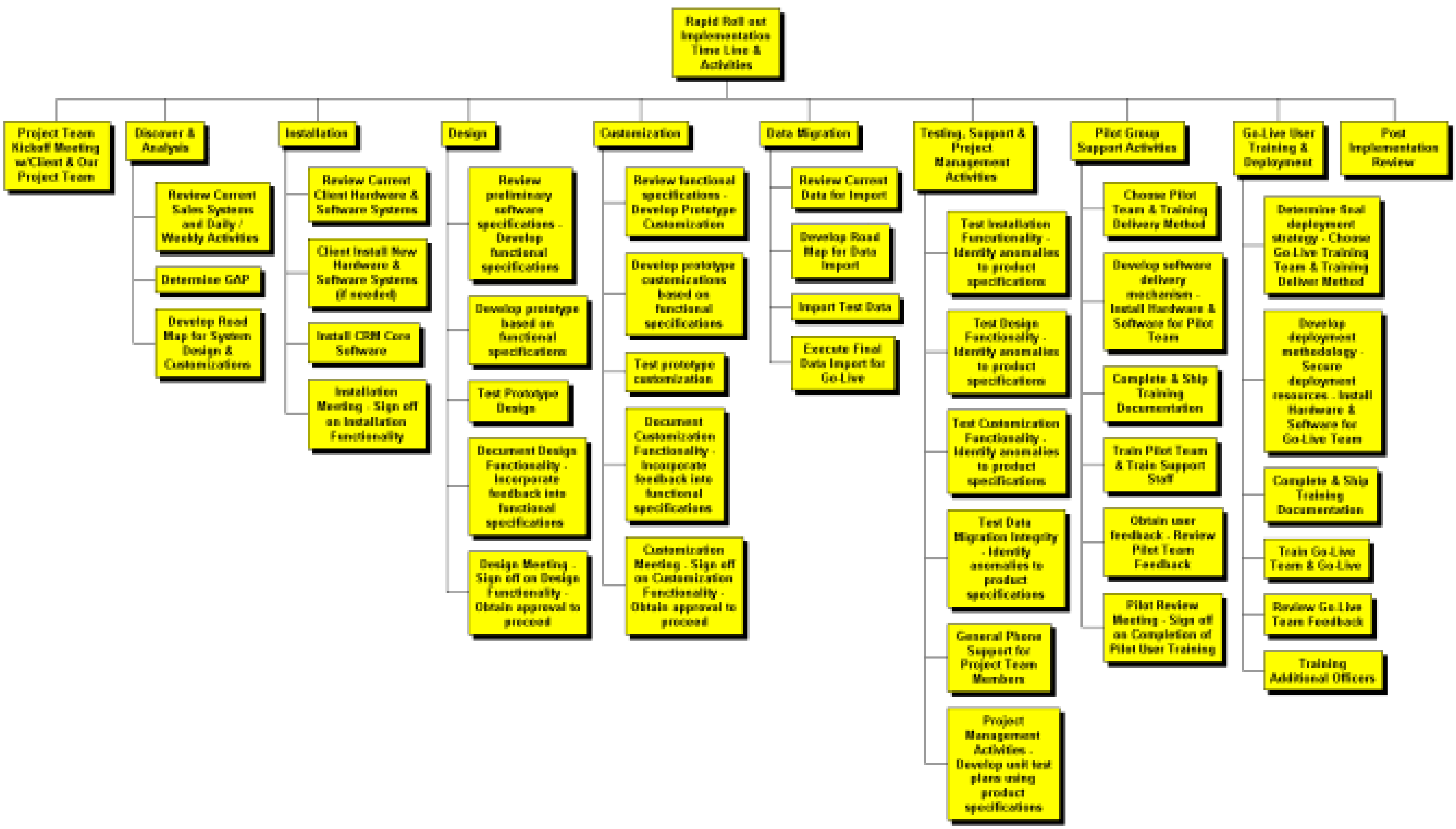


Major Project Implementation Steps - Larger Version / Summary Rollup



A CRM project generally follows the following major implementation steps (some may be performed in parallel):

Major Project Implementation Steps - Larger Version / Detailed View



A CRM project generally follows the following major implementation steps (some may be performed in parallel):

Implementation planning

1 - Kick-Off meeting

The kick-off meeting is scheduled both Project Teams. We recommend that your group's Project Leader, the Executive Management Sponsor, and the CRM Sales Software Specialists are all in attendance, as well as any other individuals that you feel are necessary. During the kick-off meeting we attempt to gain an in-depth understanding of the scope and overall direction of the program of work as perceived by the members of your team.

At the kick-off meeting we:

- Discuss the specific objectives to be attained through the project
- Develop plans and schedules
- Define responsibilities and allocate resources

With a better understanding of your objectives, "CRM Implementation Teams" CRM Sales Software Professional Services proposes an initial outline for milestones and events. Preliminary milestones outlined earlier may be changed if mutually agreed upon. The lines of communication are defined as well as the working relationship between the "CRM Implementation Teams" project team and your personnel.

Project Implementation Plan

Following the kick-off meeting, "CRM Implementation Teams" project team is in a better position to layout a specific implementation plan. This will entail the allocation personnel resources and to schedule and initiate tasks required for requirements definition, data conversion, system installation, testing, and integration. The timeframe for project meetings, interviews with key managers and project personnel, and availability of key platform hardware and project data is especially critical in order to assure that all customization, testing, installation, training, and integration can be accomplished by the scheduled project completion date.

As the Project Implementation Plan is developed, this plan will includes milestones and the actions and the responsibilities to be attained by personnel of both organizations. The template implementation plan is expanded and a more detailed Implementation Plan is submitted to you within two weeks following the kick-off meeting. When approved, this Implementation Plan serves as the basis for further project developments.

2 - Discovery and Analysis

During this phase of the project plan, we identify the needs of each of your user areas. Defining your functional requirements involves a series of interviews between the "CRM Implementation Teams" Project Team and your departmental managers, users, and supervisors.

Through these interviews, we define and clarify the following:

- The general work flow
- Current processing bottlenecks
- Detailed understanding of most critical needs
- CRM Sales Software system parameters
- User security requirements
- Customization of CRM Sales Software that may be needed
- High Level Functional Requirements for the systems integration project
- Requirements that fall outside of the CRM Sales Software software, such as changes in procedures or business processes
- Develop & Document Legacy System Integration Formats
- Document Users and User Security Requirements
- Basic reports that are needed

At this point, we do not attempt to do detailed designs, but simply identify the key functional requirements and prioritize these requirements. We also attempt to identify more efficient ways to accomplish your goals through the best use of customer relationship management. We do not simply attempt to duplicate your current processes, but seek ways to improve your operations through newer technology and functionality.

At the end of the series of interviews we provide you with a Functional Requirements document. We identify your basic functional needs in this document. We also identify the most critical modifications to the CRM Sales Software core product before beginning user training and installation of the core CRM Sales Software system.

3 - Installation

Site preparation, equipment and software installation

It is essential that the necessary equipment be installed for development, testing and training. Prior to the equipment being delivered, the site needs to be prepared properly. This site preparation is not limited to the computer system itself. Each workstation area should be prepared with the proper cabling, power outlets, keyboard space, surge suppresser and other requirements. If there will be a requirement for on-site training, a training room will also need to be set up.

In general, site preparation and equipment installation involves the following steps:

- Equipment configuration review
- Equipment ordering
- Equipment delivery and checkout
- Computer room cabling and power supplies
- Terminal cabling and modem installation
- Installation of the Microsoft Windows NT operating system and network
- Installation of the SQL or Oracle database engine

- System testing
- Training room preparation

Note that “CRM Implementation Teams” does not resell or implement computer hardware or Microsoft BackOffice products. If necessary, “CRM Implementation Teams” can recommend third parties that are familiar with the requirements of CRM Sales Software to assist you.

Product installation and set-up parameters

During this step the CRM Sales Software products are installed on your hardware platform and tested to assure that basic product performance and integrity with your hardware and operating system environment exists. Prior to the CRM Sales Software products being installed, the following system environment needs to be configured and tested:

- Microsoft Windows NT Server installed and configured
- Workgroup and remote clients connected to the Workgroup and/or Synchronization Server via a local area network or dial-up network
- Windows NT file permissions are set
- Microsoft SQL database installed and configured
- Installation of Citrix or MS Terminal Server software

The CRM Sales Software product installation may include the following services:

- Installing and configuring the CRM Sales Software Workgroup Server
- Installing remote offices (if any)
- Installing and configuring the CRM Sales Software Synchronization/Agent Server
- Installing and configuring the CRM Sales Software Workgroup Clients
- Installing and configuring the CRM Sales Software Remote Clients

4 - Design

Throughout the project the “CRM Implementation Teams” Project Team customizes the CRM Sales Software system as your business needs require. Requested customizations are implemented in a phased approach. We prioritize each of your needs into separate categories and separate phases. For each phase, we identify what functions are to be customized. As much as possible, we divide each customization into the lowest component that can be used and tested so that we can quickly get this function to your users for evaluation and testing.

Each custom change is documented and approved before we begin to make the change. An estimate is provided for each change, as well as a projected timeframe for the change to be developed and tested. A form provides:

- Construction of prototype data model
- Construction of prototype application views
- Construction of prototype VBA code
- Unit testing on modules
- Internal system testing
- Delivery of prototype application

Design change of specification - request routine:

1. A brief explanation for the requested change
2. Sample screen images, report layouts, or other materials that may best describe the change

3. A ranking of the priority of the task
4. An estimate of the effort (in person-days) required to complete the task
5. A cost estimate
6. An estimate of how the requested change will impact the project schedule

Once we have approval for doing the customization, we schedule it and assign the appropriate resources. We then provide you with a revised project schedule that includes the new task.

We believe that the best way to implement a system is to work closely with the users of the system as customizations are made. Once a task is started, the consultant involved makes the change and then presents it as soon as possible to your user(s) for review. Often, changes that you request can be accomplished within a few minutes and again presented for your review. Through this process, made possible by the flexibility of the CRM Sales Software Architect, we are able to deliver to your users a system that works correctly before training starts.

For each implementation phase in which customizations are completed, testing is accomplished using simulated data in the proper file structure and converted data form. CRM Sales Software is then tested using copies of your actual database. Once basic product performance and integrity have been established, individual customizations are installed, tested with simulated data, and then linked to and tested with copies of your actual database. Only when overall integrity has been established is the system brought up for parallel testing in your operating environment.

5 - Customization

Once the design has been completed and you have signed off on the design delivery, system customization will begin. “CRM Implementation Teams” will now start putting the final customizations on the system. All customisations are implemented with the CRM Sales Software architect. This means to you, all change to the system is passed on to the client and they are able to make future changes to the system without the assistance of “CRM Implementation Teams” implementation team. All code and code changes are passed on to you and there is no proprietary source code that you must come back to “CRM Implementation Teams” for changes. Once the customizations are implemented, the client pilot group will test the system. This testing will determine final changes to the system before going live.

- Finalize user security model
- Finalize custom code
- Finalize identified reporting needs
- Alpha test system
- Pilot test system with client pilot team

6 - Data Migration

One of the services offered by “CRM Implementation Teams” CRM Sales Software Professional Services is data conversion. You probably have compiled several years of information about your customers. You may plan to convert some or all of this information to the CRM Sales Software system. The more information that is to be migrated to the CRM Sales Software database, the longer the implementation takes. We generally recommend that you consider converting the essential information about all of your customers and prospective customers if it is available in an electronic form. The essential information usually includes the customers' names, addresses, types, telephone and fax numbers, and key contacts. If the information is not available in an electronic format, we suggest that you manually enter this information for the top 20% of customers that generate the most business for you. A temporary data entry clerk might be used for this purpose. Other customers may then be added as needed.

If customer information is in an electronic format, it generally can be converted to CRM Sales Software. The files to be imported must be provided in a comma delimited text format (e.g., *.csv). Most contact manager programs, Microsoft Access, and Microsoft Excel provide this export option. If you are importing rows of information that contain both the account and contact information in the same row, then you must indicate which address is the address to use for the account record (required since there can be multiple contacts per account that are being imported at the same time).

It is also possible to link data directly to tables in other databases, such as Access, Oracle, or Microsoft SQL Server. You can then use the existing linkages between these tables when importing data.

In the process of conversion, you may wish to "clean up" your database. For example, you may have several old customer records for customers that you do not do business with anymore. You also may have duplicate customer records. For this reason, we often encourage clients to have someone review the data before importing. Since your customer database may be quite different than any other, you may choose for “CRM Implementation Teams” Professional Services to run filters that change the values in certain fields to CRM Sales Software values, to consolidate data, or to automatically plug in certain missing fields such as State.

We will need to consult with you to determine your exact data conversion requirements. Once we have determined your requirements we will define a data conversion scope and schedule. We will attempt to identify most of your data conversion needs during the Functional Requirements stage.

- Developing import scripts
- Develop low level data cleansing / reformatting scripts
- Verify data import
- Perform territory re-alignments

7 - Testing

Testing is an important step in the success of any mission critical system project. “CRM Implementation Teams” will test in both the development and live environments. We believe it is imperative to conduct testing not only by our designers but also by your user teams. Following successful internal testing, a pilot group of selected users will test for user interfaces and system functionality. Included in this phase are a series of training, review and feedback activities.

- Beta testing of design, enhancements and code development
- Client pilot group testing
- Final system testing before going live

8 - Training

Training is an essential part of a successful CRM Sales Software implementation. “CRM Implementation Teams” offers several different courses depending on your specific project and team members’ needs. As your project progresses, your “CRM Implementation Teams” Project Manager will be able to provide you with recommendations for the training necessary for your team during each project phase.

CRM System Administrator training

CRM Sales Software Professional Service Group, through CRM Sales Software in Scottsdale Arizona, will provide training for your system administrator (and one backup administrator) on how to manage your CRM Sales Software system. The administrator training covers database archiving procedures, user management, user security, adding new licenses, recycling the Synchronization Server, maintaining the Sales Library, and defining subscriptions.

CRM System Technical training

The technical training on the CRM Sales Software Architect is optional. Most companies will contract CRM Sales Software Professional Services to provide additional enhancements to the system over time. If you also want to learn how to create new reports, new templates, or to make simple changes to the database and forms, “CRM Implementation Teams” can provide this training for your database administrator or others in your information systems group.

We encourage your technical staff to work side-by-side with our project team to learn how to administer and to modify CRM Sales Software. It is our goal to have you be able to make the simpler improvements to CRM Sales Software in the future.

CRM Sales Software User training

Comprehensive user training is essential to the success of this project. Changing your sales processes is a dramatic impact on your daily operations. Some users may resist the change. Only if your users are comfortable with CRM Sales Software will the move to CRM Sales Software proceed smoothly.

All user training involves a combination of class prerequisite reading and classroom training. The classroom training is conducted either as classroom training or remote user training.

CRM Sales Software Online Self-paced WEB based User Training

WEB based online CRM Sales Software training will give the user the basics of using CRM Sales Software for Sales including: navigating around the CRM Sales Software workspace, adding a contact, account and opportunity, creating a sales process, utilizing the activity and calendar tools, creating a letter or mail merge and viewing reports. In addition, there are topic reviews and module quizzes to reinforce what they have learned. Once they have completed the lessons in this online tutorial, they'll be able to proficiently utilize CRM Sales Software in their day-to-day tasks.

CRM Sales Software Instructor Led Web Based (Webinar) User Training

Instructor lead WEB based CRM Sales Software training will give the user additional basics of using CRM Sales Software for Sales. This environment will be a Q & A session for the users and will be designed to address specific user needs including: navigating around the CRM Sales Software workspace, adding a contact, account and opportunity, utilizing the activity and calendar tools, creating a letter or mail merge and viewing reports. These courses will be trained using the modified CRM Sales Software system the client is currently using. Sessions are set up to be 2 hours long. No more than 5 students per session. An agenda will be emailed out 2 days prior to session. The session will be a follow along with Q & A.

Follow- up CRM Sales Software Instructor Led Web Based (Webinar) User Training

“CRM Implementation Teams” has been successful with other implementations when offering follow-up “webinar” training. These 2-hour on-line classes are scheduled post-rollout and are offered on a sign-up basis. Any users who feel the need for a live “refresher” has access to a “CRM Implementation Teams” trainer via the web for a live Q & A session complete with follow along screen demonstrations.

9 - Go-Live

Go-Live rollout begins only after your CRM Sales Software system has been thoroughly tested, data has been merged and your users are comfortable with the system. In fact, we encourage users to “play” with the training database at their workstations or laptops for a few days before using CRM Sales Software in a production environment.

Rollouts are usually performed in stages, with some sales teams using the product before others. In this way, we have the opportunity to focus our support and to correct any nuisance that arise before your entire sales team is affected.

10 - Post Implementation Review

After using CRM Sales Software for ninety days, we recommend a Post-Implementation Review. During this review, which is typically three to five days in length, we will meet with key department managers to determine:

- ❑ If the system is being used to its fullest advantage
- ❑ Are key features being used correctly
- ❑ What minor enhancements can be made to provide quick and effective improvement

Appendix A – Executive Vision Statement

Our need for a State of the Art CRM System Enterprise Wide

There are now more demands on our sales and support teams than ever before, not only to win more business, but also to win the right business from the right customers. In addition to these responsibilities, those teams need to work with the rest of the organization to ensure the customer experience is consistent and service standards are met and exceeded wherever possible. To achieve these targets Sales can no longer act as a separate unit to the rest of the business, nor approach the marketplace without a structured well thought through selling process.

*With the introduction throughout our company to the **"New CRM System"**, we can help take the guesswork out of customer facing situations. It enables us to make the way we handle customers as big an advantage as our products and services. There will be no smoke and mirrors, blind luck, or high-pressure selling. Just a step-by-step system that ensures a higher rate of success for our Teams and a higher probability that our customers' expectations will be met.*

*The **"New CRM System"** will become the chain that links our enterprise wide business strategies.*

This is how:

- ✓ *Customer retention through state-of-the-art technologies*
- ✓ *Sales automation linked to business development tactics*
- ✓ *Key account management and sharing of best practices.*

With your efforts and support in the implementation of our new CRM system, we will stay competitive in the global market that we currently dominate.

Thank you for your participation, we appreciate all your efforts.

Detailed Contents

Selected Readings – Looking at the Big Picture

A CRM solution aimed at sales force productivity improvements must consider the overall aspects of sales management

by Ken Thoreson

Historically sales management has been judged on achievement of predefined sales, revenue, market growth, and quota or margin attainment. Although each of these elements is critical and will never cease being a basic judgment as to the effectiveness of sales management's success, a total CRM/SFA solution aimed at sales force productivity improvement must consider the overall aspects of sales management.

Today SFA/CRM systems from a sales perspective focus on basic 1980s sales management fundamentals: activity management, call history, and pipeline reviews. The time has come for a new perspective of missing SFA/CRM components, most notably those that will help salespeople and managers to improve individual salesperson development, to be included in the next wave of software applications. It is shocking to any professional manager that developing a sales force or even an individual salesperson has been limited to basic sales-skill training programs and occasional product/service introduction programs.

The fundamental of management is to ensure a thorough understanding of employees' needs, wants, desires, and areas of improvement. This understanding helps sales leaders succeed by working well with their salespeople. Why do salespeople fail, and why do sales managers fail? Neither group knows what is expected of them or fails to understand their basic job functions.

Why is CRM/SFA failing sales teams? As an application, it has failed to assist sales managers in developing their sales teams. It has simply assisted them in what is going wrong with sales production.

Where should CRM/SFA move? It must elevate beyond the current marketing-driven product to one that sales leaders can use to truly build high-performance sales teams. Most current systems miss the point.

The elements for a true sales management system must focus on aligning the soul of the salesperson with the goals of the corporate entity. Today's sales teams must be focused on their personal goals, and appreciate how they relate to achieving the corporate sales objectives. Sales leaders must understand this and create systems that incorporate these views into their management styles and systems.

The fundamental elements must include a process to determine the ratio of success factors for each salesperson as compared to the group success factor. These sales actions or success factors are generally the four or five measurements that show proper sales activity ratios compared to performance. These must be measured weekly/monthly, graphed and corresponded to or reconciled with bookings/revenue attainment for the same periods. This graphing for success will allow each salesperson to visualize and understand their unique activity requirements and how they can help them exceed their fundamental sales achievement goals. Most important, it allows the sales manager to begin to coach and mentor individual team members as to the right, unique level of activity required for each salesperson to be successful.

The next level of true sales-management focus must be in allowing the salesperson, with sales management approval, to create a process for professional development. SFA/CRM systems must include a set of development tools that allow and even force sales managers to regularly review the sales development of each salesperson. These would be self-generated, quarterly development tools that allow the salesperson and sales manager to review success and areas requiring improvement.

Salesperson development must focus on:

1) **Sales skill development**
2) **Product/service knowledge**
3) **Industry expertise**
4) **Technology exposure**
5) **Personal growth.**

This equates to a total "rounding out of the person" rather than a one-dimensional skill focus. If SFA and CRM software have been developed for sales productivity, it is questionable why there has been no focus on career pathing, self-development, or professional development. These development programs must be ongoing and renewed every six months to ensure continuing enhancement to the professionalism of a sales organization.

In many market segments professional development is considered or called certification. If professional development is considered important in the legal, financial, technical, and educational market sectors, why it is not critical in sales or sales management? SFA/CRM has not provided a set of process or tools to assist in the development of the sales team. Yet developing a sales team is the fundamental focus of long-term, successful sales managers.

In most sales organizations strategy and sales tactics are critical to the success of attainment tactics. Although most SFA/CRM software applications provide tools to develop active sales tactical strategy via Miller Heiman's Blue Sheet and other sales training tools, few if any SFA/CRM software products develop a salesperson's knowledge or thinking process in determining territory or account-development planning. Yet this thought is necessary to attain market/account penetration or sales achievement goals, and it is critical in the current economic environment to ensure all that potential sales opportunities are uncovered and worked.

The best sales mangers are always remembered or graded not only on achieving sales objectives, but also on the great salespeople they have developed and moved forward in the organization, or into other companies. When will the SFA/CRM market recognize that its role is to assist in developing successful sales teams, not in simply reporting why they failed?

About the Author

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Why finance must create CRM objectives and metrics that will translate back into its traditional framework.

by Tom Richebacher
Monday, June 30, 2003

In two previous articles I outlined how to create analytical methods that support customer-focused profitability and forecasting & budgeting analysis (" The Art of Customer Profitability Analysis" and " The Financial Side of CRM"). I explained that finance cannot continue to conduct business as usual in a CRM environment, because its conventional analytical toolkits and systems lack customer dimensions.

This article, the last in the series, focuses on the third area where finance has to evolve: creating CRM objectives and metrics that can be translated back into the traditional framework of income, balance, and cash flow statements for financial planning and reporting.

After all, CRM success ultimately depends on irrefutably proving that realizing CRM objectives leads to improved financial performance and is the result of specific CRM activities. Becoming too preoccupied with customer retention, acquisition, and satisfaction goals for their own sake is perilous, because their initial appeal inevitably wears off, and rightfully so, when tangible payoffs cannot be traced to them.

Reorienting to a Customer Perspective

At the core of every CRM initiative are objectives containing a customer-value proposition that describe clearly the targeted customer segments and the corresponding product/service strategies. The first provides the underpinnings for differentiated customer treatments that are the basis for CRM efforts; the second the process to measure.

However, as uncomplicated as this sounds, supporting these objectives is not easy for the finance department. Its product-centric analytical methods and systems reflect the philosophy that companies are solely the sum of theirs individual parts; a view that fails to take into account the complete chain of activities that creates customer value across the whole enterprise. The chief hurdles finance will encounter are finding and consolidating the data needed to develop a enterprise-wide customer perspective; translating non-financial goals into financial ones; and pulling CRM objectives out of their ambiguity. This article focuses on the latter two, because they create the greatest amount of confusion due to the nebulousness of many CRM objectives.

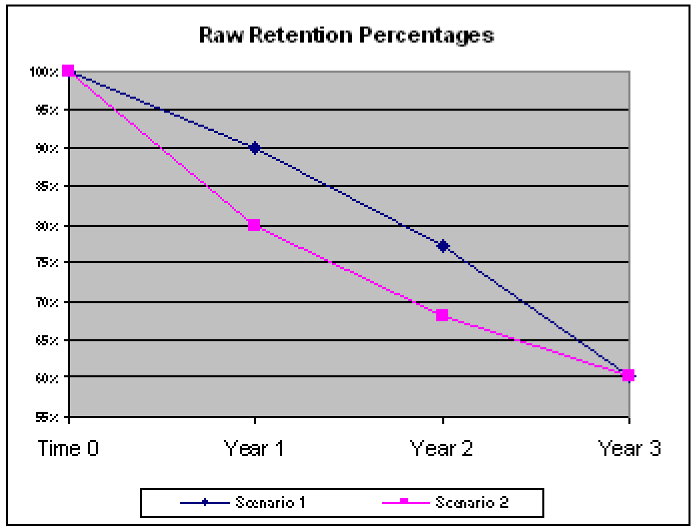
Demystifying CRM Objectives

First, CRM objectives need to be clearly defined. For example, catalogers view retention on a sliding scale based on customers' most recent purchases. Recent purchasers are considered "more" retained than those who bought a while ago, because the probability of additional purchases diminishes as the time since the last purchase increases. Conversely, wireless companies view retention as cut and dry, customers either continue their service or they don't--retention equals not disconnecting the service.

Second, because no clear-cut way of understanding or evaluating the financial repercussion of CRM objectives exists, standard measurements need to be established that hold them accountable. You have to move from clarification to dissection--cumulative goals are pulled apart to reveal their internal workings: a process practically identical to the one used for conventional goals. Take, for example, a publisher that wants to increase the renewal rate of subscriptions from 40 percent to 60 percent over a three-year period. Certainly, management wants to know prior to that time passing the financial impact of achieving this goal under different scenarios. Table 1, which breaks the cumulative 60 percent goals into yearly intervals for two scenarios, gives you an idea of how this can be done.

		Year 1			Year 2			Year 3		
	New Customers	Active Checking	Ret. Rate	Inc. Ret. Rate	Active Checking	Ret. Rate	Inc. Ret. Rate	Active Checking	Ret. Rate	Inc. Ret. Rate
Scenario 1	10,000	9,000	90%	90%	7,700	77%	86%	6,000	60%	78%
Scenario 2	10,000	8,000	80%	80%	6,800	68%	85%	6,000	60%	88%

You can see that both scenarios reach the goal (shaded column). Scenario 1, retains 90 percent of customer after the first year, 77 percent after the second, and 60 percent after the third, while Scenario 2 retains 80 percent, 68 percent, and 60 percent over the same time period. However, from a financial and marketing analysis perspective, reaching the goal is of minor value; far more important is to understand the causes of the disparity in retention patterns and their effect on the bottom line.

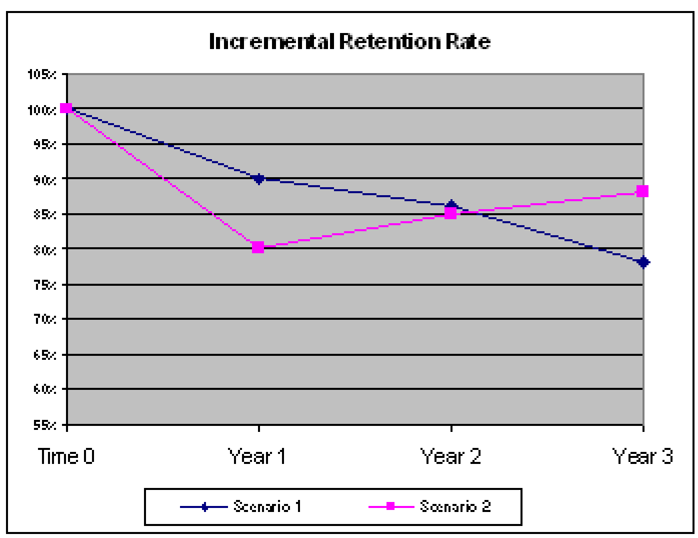


Creating Visibility

Understanding the later is a two-step process. It requires moving beyond the apparent decline of retention from one year to the next, to exposing concealed dynamics. A good way to start is by calculating the incremental retention rates: the percentage of retained customers for a given year divided by the percentage from the previous year.

For Scenario 1, divide 90 percent by 100 percent for the first year, 77 percent by 90 percent for the second, and then 60 percent by 77 percent for the third. The numbers you get are 90 percent, 86 percent, and 78 percent. The same calculations for Scenario 2 yield 80 percent, 85 percent, and 88 percent. Input the newly created data, and the original raw retention percentages in a spreadsheet and create the two graphs as shown below.

As you can see, the graphs portrait two very different flows. The raw retention graph shows a gradual decline in percentages towards the same point for both scenarios, while the incremental graph shows that them moving during the second and third year in opposite directions and then ending up at very different end-points. From a marketing perspective these dynamics reveal that customers in Scenario 1 remain in their first year in the service at a greater rate than those from Scenario 2, but that this behavior reverses itself in the following two years as the incremental retention from Scenario 2 increases. What this data suggests is that Scenario 2 might have greater retention than Scenario 1 in the long run, despite its poor performance in the first year.



The next step is translating the retention process into cash flows. Table 2, shows cash inflows assuming annual revenues of $200 per customer.

	Year 1	Year 2	Year 3
Scenario 1 Total = $4.54m	9,000 * $200 = $1.8m	7,700 * $200 = $1.54m	6,000 * $200 = $1.2m
Scenario 2 Total = $4.16m	8,000 * $200 = $1.6m	6,800 * $200 = $1.36m	6,000 * $200 = $1.2m

You can see that Scenario 1 creates $380,000 more than Scenario 2. However, 100 percent of this difference is accounted for during the first two years; in year three cash inflows are equal and looking beyond that time it appears the Scenario 2 will generate more revenue. Results that confirm the impression from the incremental rate analysis that in the long-run Scenario 2 might be the stronger one.

Next you need to assign the costs that correspond to the revenue stream. Go to the first article in this series, " The Art of Customer Profitability Analysis," for ideas on how to do that. Keep in mind that when doing so in the context of developing an attrition model, as we are doing here, you need to figure out how to deal with potential unamortized amounts that are created by customers leaving the program at a net loss. Some companies write them off, because they belief that customer profitability should be evaluated on the individual level; others spread them over the remaining customer base, because they consider the loss part of the cost of acquiring and servicing those that remain active.

Meeting the Challenge

Frustration with traditional financial systems and objectives quickly emerges in a CRM environment, as they are an outgrowth of a time when a company's main objective was optimizing manufacturing processes. The irritation is as much with the philosophy that separates cost and revenue at the customer level, as with the inflexibility and isolation of the systems--attributes that successfully block, or at the very least make it very burdensome to use them for customer relationship management. The latter requires an unimpeded flow of information throughout the organization.

But the challenge is not limited to the infrastructure level. After all, its design is a mere reflection of the philosophy that companies are nothing more than the sum of their isolated operations. A viewpoint that generally permeates every aspect of a company, from who is hired, how accountability is doled out, types of analysis done, and certainly the nature of objectives.

However, changing, or evolving to a customer perspective doesn't mean that everything has to be reinvented or existing knowledge become invalid. Evolution in this context means gradual change to a broader perspective, it is inclusive not exclusive. You don't relinquish existing know-how, but apply it in a different way. For instance, the ROI ratio, despite its shortcoming, is popular, because it communicates concisely the critical relationship between income and invested capital. You can only compare business results if you know what it took to generate them, a principle that holds true in a CRM environment.

Evolving finance from a strictly product-focused perspective to a function that is flexible enough to include a customer perspective requires also the willingness to question deeply imbedded views of control and accountability. Challenges you will encounter are not going to be limited to hardware, software, or data issues, as CRM is about the empowerment of employees so that customers are better served. The types of goals you choose, and the methods to evaluate them, can have a profound influence on the behavior of individuals, and therefore the organization--for better or worse. So as is the case with the development of customer-based profitability and forecasting models, be pragmatic when creating CRM goals: clarity and simplification reign.

About the Author

Tom Richebacher is an information specialist with the EDS Business Intelligence team. His area of expertise is the creation of statistical and financial models based on database services that are used for customer relationship management purposes. He also develops the infrastructure and reporting systems needed for financial, marketing, and operational analysis and information delivery. Contact him at thomas.richebacher@eds.com