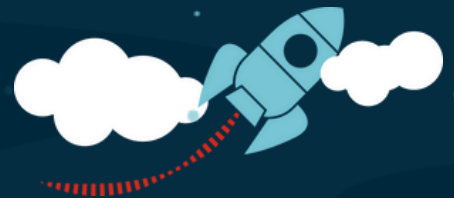




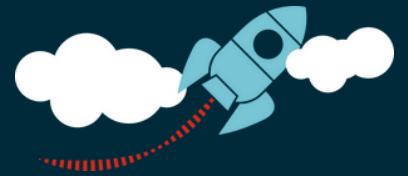
# BOSS YOUR CRM PROJECT



A GUIDE TO MANAGING A SUCCESSFUL CRM PROJECT.  
IDEAL FOR CRM NEWCOMERS AND BUSINESS OWNERS.

If you've decided it's time to ditch the spreadsheet or clunky old CRM system and invest in some modern CRM technology this guide is for you. Written by an experienced team of CRM project managers, we share the pitfalls to watch out for and the key steps you should take to ensure a smooth CRM journey for your business.

## **IF YOU'RE SERIOUS ABOUT TRANSFORMING YOUR BUSINESS WITH A NEW AND IMPROVED CRM, USE THIS GUIDE TO MANAGE YOUR PROJECT SUCCESSFULLY.**



**In this guide we'll be taking a look at the following areas:**

1



YOUR PEOPLE

2



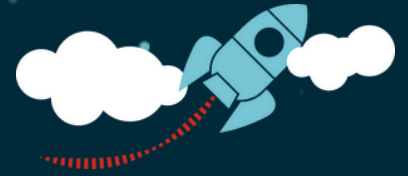
YOUR PROCESSES

3



YOUR PROJECT

# YOUR PEOPLE



## Creating a project team

The very first thing you will want to do before you begin any research or think about system needs, is build a project team. Undoubtedly, your people make your business, without them you don't have a business. They are the closest to your customers and the most familiar with your processes, so when it's time to embark on a CRM project you should involve your key people.

Depending on the scope of your CRM requirements you may choose to include those responsible for your sales operations, your marketing activity, management of operations (though could well be yourself) and business administration.

If your company has in-house IT resources, you'll most definitely want them involved too. Aim to get the viewpoints and contributions of those who know your business the most. It is their input that will shape your project and shape the final CRM solution.

We also recommend, appointing a project lead. Now, this could be yourself, but for many business owners who are busy spinning countless plates, it pays to hand over the responsibility to a CRM lead. This can sometimes be a head of sales, marketing lead or someone responsible for business development.

Whomever you appoint, it makes sense that this person has a strong understanding of your commercial operations or a commercial skillset.

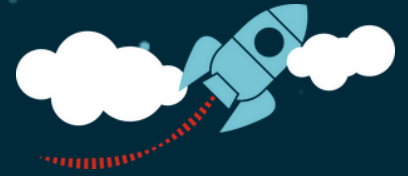
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**when it's time to embark on a CRM project you should involve key people in your project team.**

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# YOUR PEOPLE



## Supporting your staff

The more motivated, involved and supported your staff are in this CRM project, the greater the chances of success. We know, we've said that countless times before, but it's true.

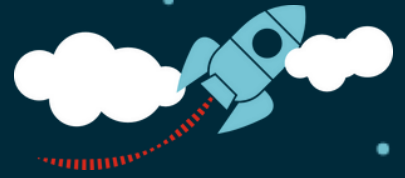
Depending on which route you take, an off-the-shelf or custom-built one will have a significant impact on the level of support offered to your staff. If you are choosing an off-the-shelf solution then carefully look at the support package your software provider offers. Here are some considerations when it comes to staff support and training:

- What does that support look like?
- Does it include a set number of hours?
- How long is it available for once you've gone live?
- What level of training will your software provider give your staff and in what way?
- Is it self-service online?
- Is your team expected to watch videos and read documents, or is it more hands-on with bespoke, tailored training? Will it all be remote or can they be on-site?



**Everyone learns in different ways, so consider this when reviewing the training and support offered by the vendors.**

# YOUR PROCESSES



## Understanding your processes

The success of a CRM project is directly linked to your ability to manage your internal processes and as we previously said, often it is your employees who are the closest to your processes so make sure they are involved.

For some businesses, embarking on a new CRM project is often the ideal opportunity to place their processes under the microscope. Look at how they currently do things and actually ask themselves 'is there a better way we could do this?'

Regardless of the new CRM coming along, this process review will be well worth the pain.

## Avoid unnecessary complexity

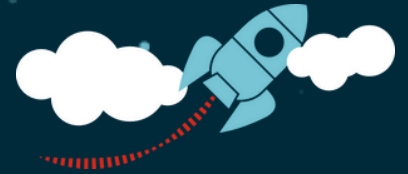
Be mindful that whatever complexity your business currently creates through the way you operate, will only need to be worked into your CRM build and that can create some headaches later down the line.

What's more, you may even find that if you choose a custom-built CRM solution, you can use the CRM system to simplify your processes, driving efficiency and productivity for your whole team.

And that is beneficial not just for your team, but for your customers and your business as a whole.



# YOUR PROCESSES



## Take a good look at your data

Later in your CRM project, you are going to have to migrate your data from your existing legacy system to your shiny new CRM. The last thing you want to do is move over poor quality data.

Get off the best possible start with your new system and begin as you mean to carry on- with good data management processes. If you know your data management leaves a lot to be desired, then it's probably time to start giving some serious thought to adopting some better data management processes and handing that responsibility to your team.

Any CRM system is only as good as the data sitting within it and although in this digital world much of the data management is automated a lot is also reliant upon your teams manually updating records.

## Are your data management practices up to scratch?

Firstly, the question is do you have any formal structure to your data management processes? Of not, it may be wise to think about resources allocated to managing your data now but also in the future. If you're serious about growing your business, which you must be, to be considering investment into a new CRM, then ensuring you have the resource to keep that data the best it can be is also a worthwhile investment.

If you're planning to use your data for sales and marketing purposes, you'll be grateful you focused on data quality later down the line. As decayed data only results in weakened sales and marketing efforts. Which ultimately means wasted effort and resources.

**Consider how you acquire your data. is it part-automated, for example, via website forms? Or is it manually inputted by your staff? If you are heavily reliant on manual input, how much can you automate to reduce errors and remove the burden from your workforce?**



# YOUR PROJECT

**Successful CRM implementation takes strong project management skills and good communication. Let's look at some more critical considerations for a smooth CRM project...**

## Selecting the right software solution

We have written a separate guide 'Guide to selecting the best CRM for your business,' which delves into more detail on this subject, but let's summarise it here too.

We can't stress enough how important it is to choose the right CRM for your business. Many past clients have come to us to switch from unsuitable software. Sometimes, they have naturally outgrown their existing solution that was fine when they were first setting up.

Other times, they are badly advised or choose to go with a recommendation from someone who used a system previously. Worse, still, they don't carry out enough due diligence on any potential supplier. This is a huge error. As every business is unique. So, simply choosing a system because it is well known, is presented well in its advertising doesn't mean it is actually right for you now or in the future.

## Planning for the future

For growing or ambitious companies especially, you do well to think carefully about your future. What are your growth plans, your vision? Are you confident that the CRM you select will still be fit-for-purpose in years to come?

If it isn't flexible or future-proof, it could mean another CRM project two, three, or five years down the line and that's more cost and time wasted which could be spent elsewhere. We delve into more detail in our Guide for selecting the right CRM for your business, but if you're serious about growth then you want to be serious about a future proof CRM.



# YOUR PROJECT



## **Preparing yourself for migration and go live**

Once you reach the final stages you will be excited to get it rolled out and live. The anticipation and excitement will be felt by everyone, but do not rush this part, this is a very critical part of any CRM project.

We've already covered the importance of cleansing your data before migration, but also be mindful of what happens at the point of migration. If your CRM project has some complexity to it then prepare yourself for a 'adjustments' where your vendor will need to iron out the creases once your data has been moved.

This can add time to your project that you had not foreseen. Keeping everyone up to date with this phase is also vital, so that you retain confidence and enthusiasm for your go live.

## **Appointing consultants**

You only need to think about consultants and the role they'll play if you're looking for a custom-built CRM. You may very well decide that an off-the-shelf solution is all you require and if that is the case, you won't require a CRM consultant, as you'll likely have access to support through your vendor online and access to a support portal.

However, if you are confident that a custom-built CRM is a way forward for your ambitious fast-growing company then you will want to give careful consideration to the consultant(s) you appoint to manage your project.

Whomever you appoint, they will for a considerable length of time become a member of your team and they are going to get to your business very well, or certainly, they should that invested that they almost feel like a member of the team! The trust and confidence they build with your team are vital to successful implementation and rollout. The more bought in your team is to your project lead and specialist, the greater the chances of success.

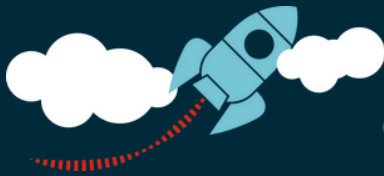
Look for those qualities you know will gel well with your company culture, it may seem like your interviewing them, but in a way you really are. The investment is that significant that you shouldn't shy away from putting them through their paces and when they are pitching their solutions ask 'have they taken enough time to really understand my business?'



# IN SUMMARY

**APPROACHING YOUR CRM PROJECT IN A SYSTEMATIC FASHION WILL INCREASE THE CHANCES OF A SUCCESSFUL OUTCOME AND DATA MIGRATION.**

**IF YOU'RE READY TO CONSIDER YOUR SOFTWARE OPTIONS READ THE 'GUIDE TO CHOOSING THE RIGHT CRM' AND ACCOMPANYING CRM VENDOR SCORECARD.**



This guide and the other elements of the CRM Project Kit are brought to you by the team at Rocket CRM.

Written and produced by a team of CRM and marketing experts, it is designed to make your CRM project a breeze so you can make the right decisions for your business and transform the way you manage and leverage your data.

## **Rocket CRM**

[www.rocketcrm.co.uk](http://www.rocketcrm.co.uk)

[sales@rocketcrm.co.uk](mailto:sales@rocketcrm.co.uk)

01456 7894489



@rocketcrmuk



@rocket-crm