

# 10 Steps to Guide Your CRM Implementation

DISCOVER BEST PRACTICES

**FORVIS**

FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office

1

## About FORVIS

**Services**

- Assurance
- Tax
- Advisory

**FORVIS, LLP** ranks among the nation's top 10 professional services firms. Created by the merger of equals of BKD, LLP & Dixon Hughes Goodman, LLP (DHG), FORVIS is driven by the commitment to use our forward vision to deliver unmatched client experiences

**WEBINAR**

United Kingdom

Cayman Islands

**FORVIS**

FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office

2

# Business Technology Solutions

FORVIS Business Technology Solutions supports strategic business planning, process definition, & technology solutions to help advance your business

CRM & ERP Consulting

Microsoft Dynamics 365

Salesforce


Sage

FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORVIS**

3

## Presenter



**Chad Collett**  
Director of Marketing  
FORVIS Business Technology Solutions  
Email: [chad.collett@forvis.com](mailto:chad.collett@forvis.com)  
Phone: 920.560.6882  
**in**: chadcollett

FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORVIS**

4



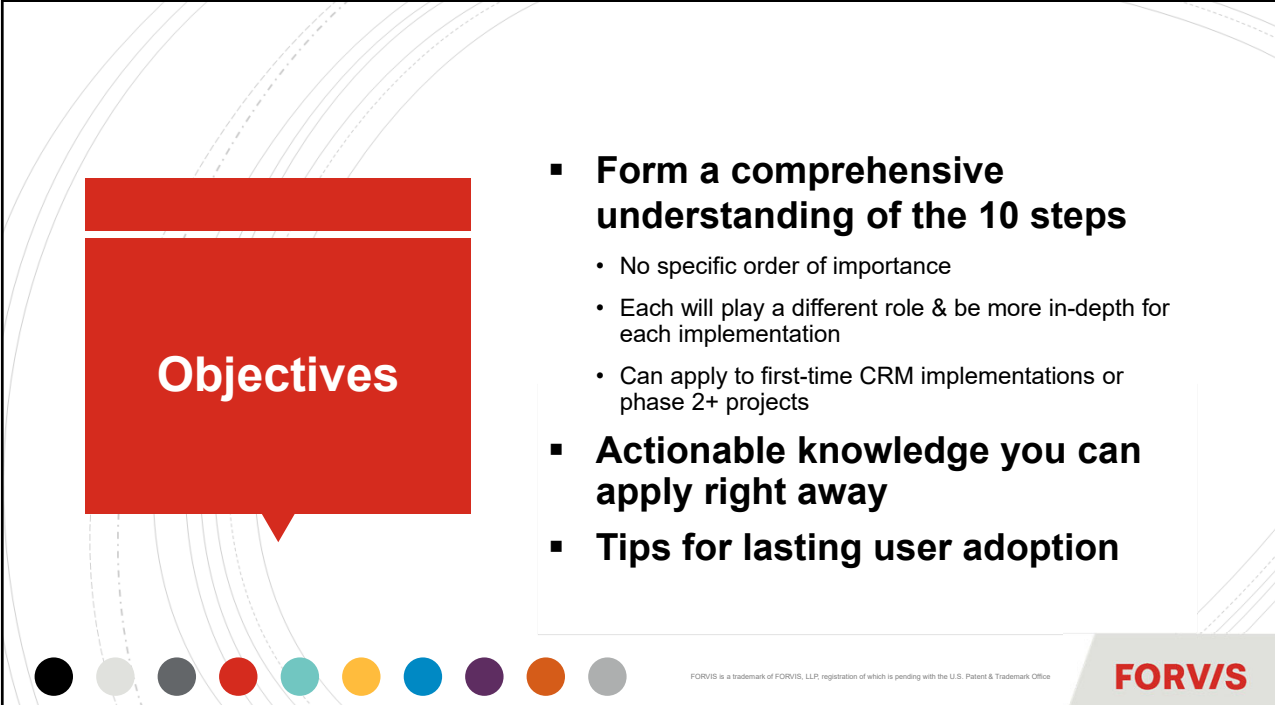
# 10 Steps to Guide Your CRM Implementation

DISCOVER BEST PRACTICES

**FORV/S**

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

5



## Objectives

- **Form a comprehensive understanding of the 10 steps**
  - No specific order of importance
  - Each will play a different role & be more in-depth for each implementation
  - Can apply to first-time CRM implementations or phase 2+ projects
- **Actionable knowledge you can apply right away**
- **Tips for lasting user adoption**

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent & Trademark Office

**FORV/S**

6

#1

**Define Your Vision**

WHAT ARE YOUR GOALS?

FORV/S

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

7

**Define Your Vision**

- Understand the 'Why' → Defines the Vision
  - System Consolidation
  - Streamlined Processes
  - Data Integrity
  - Analytics
  - Collaboration
  - Customer Relationship Insight
  - More Usage
  - Forecast Accuracy
  - Lead Management
  - Efficiency
- Process First; Technology Second
- Stay aligned with your Vision

FORV/S

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

8

# Define Your Vision



### YOUR ROADMAP TO SALES PROCESS SUCCESS

**FAMILIARIZE YOURSELF**  
To start your journey to sales process success, you have to first identify or discover your current state. As a leader of your organization, it's important you already know that you're a process master and your only routine, so leading your team is the clear next step.

**DEFINE YOUR PROCESS**  
At this point on your process map, you must ask yourselves, "Do we already have a structured process in place?" In order to know how you'll get to the finish line, you have to know how you're getting there.

**KNOW THE BENEFITS**  
The answer benefits an effective sales process will have on your organization is up to you and your team, but across organizations, an effective process should be repeatable, consistent, efficient, and set expectations.

**CREATE YOUR PROCESS**  
You're at an exciting point on your process roadmap! It's time to create your process. You may pick from a variety of the templates out there to create your own, which is important at this point is identifying your unique process attributes. Don't get lost on your way to point #5. As you evolve, you may have to refine your map later.

**OVERLAY THE CUSTOMER JOURNEY**  
Whatever your sales process looks like, it should reflect and mirror your customer's journey. This will ensure utmost effectiveness and help you reach the finish line more efficiently.

**DEVELOP YOUR STAGES & ACTIONS**  
At this point on the map, it's time to set a clear and concise path to see you through to the line. Ask yourselves what actions it will take to get you where you want to go.

**CREATE CONSISTENCIES**  
Map the flow, identify roles and responsibilities of team members, and how your team should effectively share your process. Consider creating process checklists or resource guides they can refer to from here on out!

**CREATE EFFICIENCIES**  
Now it's time to bring in your technology. If you haven't already, the sales tools of your sales process are constantly laid out in your CRM system. This will help to build everyone's accountability.

**ADDRESS PITFALLS**  
At this point on your sales process roadmap, there are things to be mindful of to ensure you're able to prevent them from happening. When you feel well-equipped and have followed these steps, go out there and kick some sales process butt!

**ACHIEVE MASTERY**  
At the end of your sales process roadmap, you should feel confident in your process, CRM system, and your team members. When you feel well-equipped and have followed these steps, go out there and kick some sales process butt!

## TOP 4 REASONS TO IMPLEMENT A SALES PROCESS

SALES PROCESS BENEFITS

- 1 CREATE REPEATABLE EXECUTION**  
A defined sales process has consistent steps that align with the way your buyers buy. Your team clearly understands what they need to do, what resources they need at each stage and are more efficient at their sales execution.
- 2 MAINTAIN CONSISTENT EVALUATION**  
A sales process provides a measure of uniform evaluation for your sales team representatives. Increase the consistency of sales forecasting as well with a defined sales process.
- 3 SIMPLIFY CUSTOMER DECISION MAKING**  
Improve lead velocity by empowering your sales team to create the road map for the buyer without distractions and roadblocks.
- 4 DRIVE LONG-TERM RESULTS**  
A well executed sales process creates a more efficient and productive sales team that fosters customer retention and creates organic growth opportunities (and profitability too!)

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**

9



✓ #2

# Partner Selection

DO YOUR VALUES ALIGN?



FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**

10

# Partner Selection

- Define Your Project Needs
- Define Your Partner Selection Criteria
- Contact Partner References
- Define & Share Partner Expectations



FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**

11



✓ ✓ #3 ● ● ● ● ● ● ● ●

# Develop Your Team

WHO SHOULD GET ON BOARD FIRST?

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**

12

# Develop Your Team

Purpose of the Team	Involvement of the Team	Size of the Team
<ul style="list-style-type: none"> <li>• Foster buy-in from the top down</li> <li>• Represent all applicable areas of the company</li> <li>• Discuss the full range of requirements</li> <li>• Promote ownership &amp; usage</li> </ul>	<ul style="list-style-type: none"> <li>• Involvement at various points</li> <li>• Design &amp; requirements gathering</li> <li>• Testing</li> <li>• Roll-out &amp; go-live</li> <li>• Post go-live</li> </ul>	<ul style="list-style-type: none"> <li>• Team size will vary</li> <li>• Organization size &amp; structure</li> <li>• Scope of implementation</li> </ul>

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**

13

# Develop Your Team

Steering Committee	Key Stakeholders & Executives	Team Captain/ Project Manager
Subject Matter Experts	Cross-Functional/ Department Users	IT

### QUESTIONS TO ASK

Does this person have ...

- Good overall **knowledge** of company &/or specific area of company (vision, strategy, goals, industry)?
- An **open mind** to change & process improvement?
- Ample **time** to dedicate to the project?
- Good **rapport** with users?

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**

14

**Develop Your Team**

TOO SMALL

TOO LITTLE TIME

TOO MUCH IT

TOO MUCH MANAGEMENT

TOO BIG

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**

15

✓ ✓ ✓ #4

**Establish Your Plan**

EVERY CRM IMPLEMENTATION PLAN IS UNIQUE


FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**

16



# Establish Your Plan



- Clearly define the project scope
- Start strong with a project kickoff meeting
- Keep the project(s) in scope
- Establish communication

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**

17



# Specify Requirements

WHAT DO YOU WANT CRM TO DO?



FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**

18

# Specify Requirements

List your current processes; this can be done at any point (even before the project kickoff)

## Identify pain points

- What processes or steps take too much time to complete?
- Which do users complain about or skip?
- Which seem inefficient or too manual?
- Which are too complex?
- Which don't make sense?
- Which are most important?

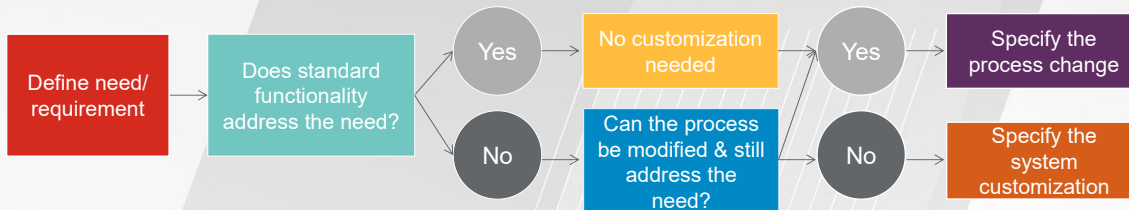


FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**


# Specify Requirements

- Don't focus on technology
  - It shouldn't define your processes, your business needs should
- Prioritize, prioritize, prioritize
- Define mobile requirements



FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

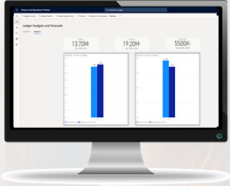
**FORV/S**





# Manage Your Data

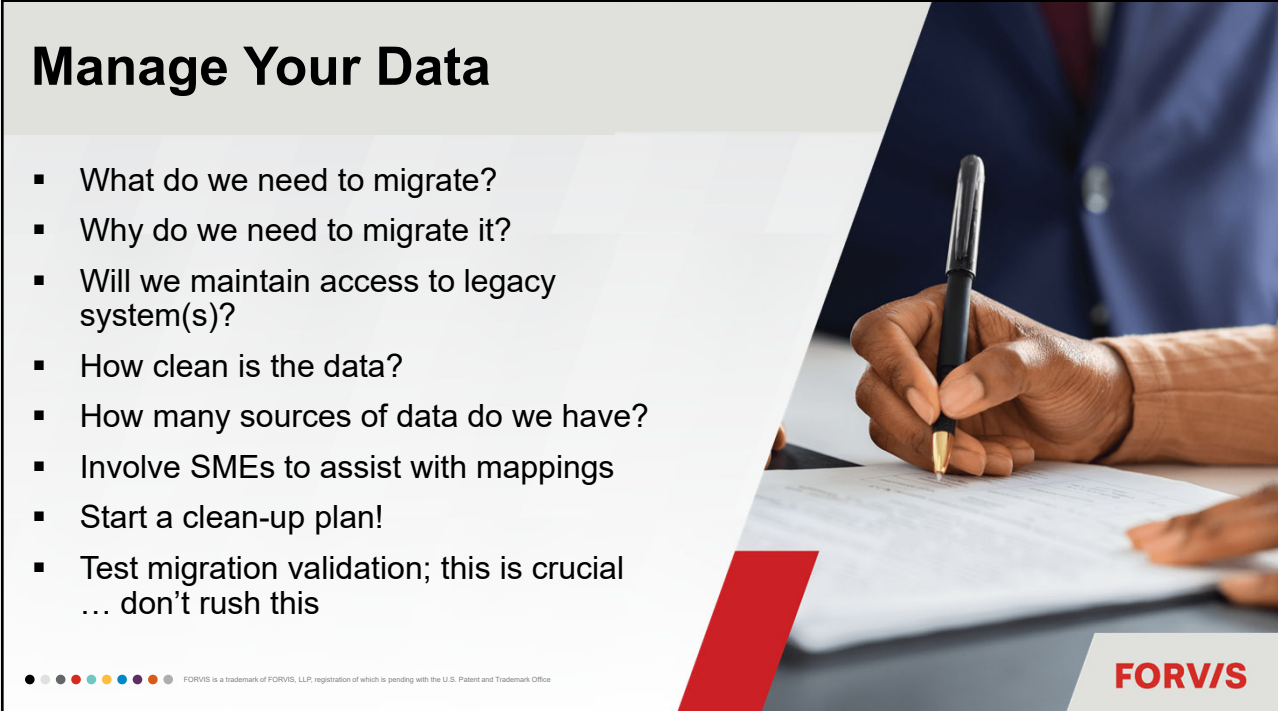
WHAT DATA DO YOU WANT TO MIGRATE INTO CRM?



FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office


**FORV/S**

21



# Manage Your Data

- What do we need to migrate?
- Why do we need to migrate it?
- Will we maintain access to legacy system(s)?
- How clean is the data?
- How many sources of data do we have?
- Involve SMEs to assist with mappings
- Start a clean-up plan!
- Test migration validation; this is crucial ... don't rush this




FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**


22

# Manage Your Data




**Plan & Discuss Integration Needs**

- What are we integrating?




**Don't Integrate Just to Integrate**

- Why should we integrate it; is it worth the investment?
- It **MUST** add business value
  - Data accuracy
  - Insight
  - Efficiency



FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office



23

# Manage Your Data

Know what you are getting involved in; don't underestimate


Be INVOLVED

Ask questions


Adequately validate to avoid costly modifications

**QUESTIONS TO ASK**

- What do we need to migrate?
- Why do we need to migrate it?
- Will we maintain access to legacy system(s)?
- How clean & reliable is the data?
- How many sources of data do we have?



FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office



24














# Communication Plan

CATER TO DIFFERENT NEEDS




FORV/S

25

# Communication Plan

- Communicate up, down, & out
- Types of communication
  - Project kickoff
  - Manager meetings
  - Project newsletter
  - Launch party
- Before, during, & after project communications



FORV/S

26

✓ ✓ ✓ ✓ ✓ ✓ ✓ #8 ● ●

# Documentation

DOCUMENT NEW PROCESSES

FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office

FORVIS

27


## Documentation

- Document new process definitions & standard operating procedures
- Discover playbook advantages
  - Assist with CRM training
  - Assist with onboarding new users
  - Process & data consistency
  - Reference for future upgrades
- Develop a plan/schedule for distributing & updating it

FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office

FORVIS

28



✓ ✓ ✓ ✓ ✓ ✓ ✓ #9

# Keep the Momentum

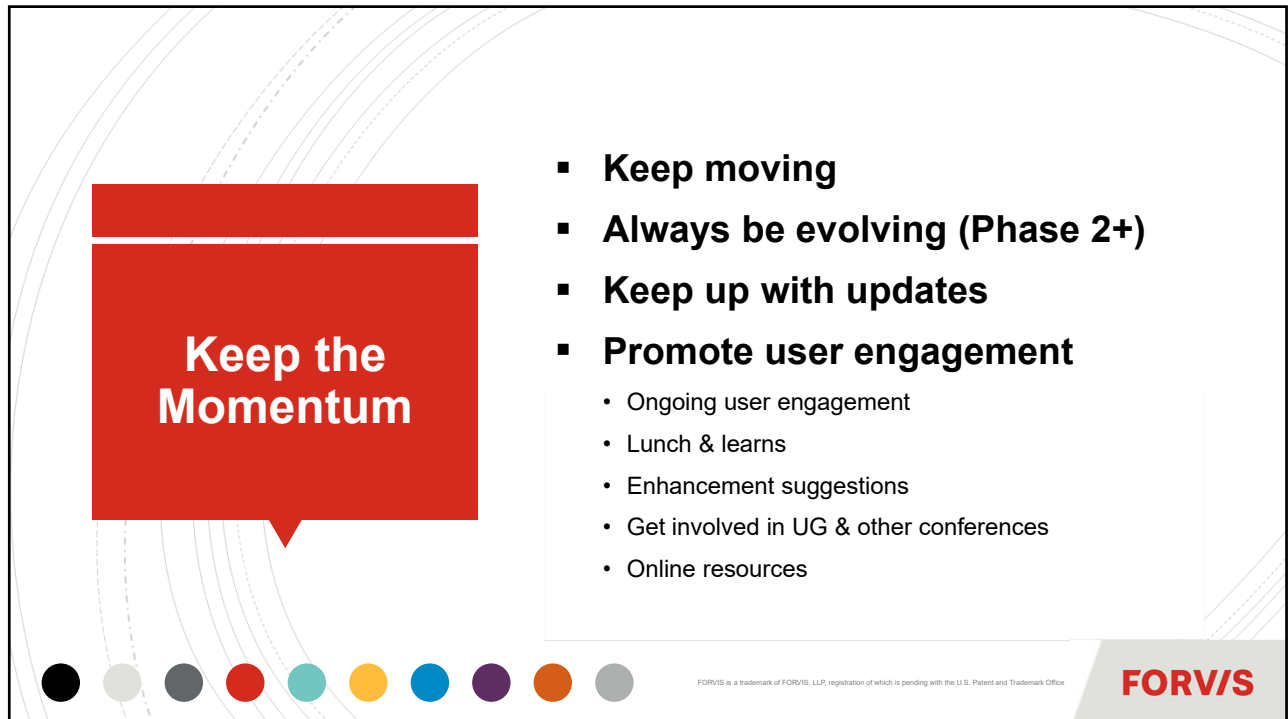
DON'T LOSE THE EXCITEMENT OF YOUR IMPLEMENTATION DAY



FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**

29



## Keep the Momentum

- **Keep moving**
- **Always be evolving (Phase 2+)**
- **Keep up with updates**
- **Promote user engagement**
  - Ongoing user engagement
  - Lunch & learns
  - Enhancement suggestions
  - Get involved in UG & other conferences
  - Online resources

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

**FORV/S**

30

#10

# User Adoption

THE MOST CRITICAL PART OF YOUR CRM IMPLEMENTATION

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

31

## User Adoption

- Communicate the “big picture” & business value
- Involve your team in the planning/process design
- Show how it will help the team succeed
- Train & re-train
- More than “build it & they will come” —rather “build it so that it creates efficiencies, then they will come!”

**10 Tips**  
**on Achieving High CRM User Adoption**  
**FROM THE START**

FORV/S is a trademark of FORV/S, LLP, registration of which is pending with the U.S. Patent and Trademark Office

32



# User Adoption



**10 CRM MYTHS + MISCONCEPTIONS to Debunk with Your Team**



**10 Tips on Achieving User Adoption During Your CRM Rollout**



**10 Tips on Gaining CRM User Adoption After YOUR ROLLOUT DAY**



**4 BENEFITS TO HAVING A WELL-DEFINED CRM PLAYBOOK DURING YOUR IMPLEMENTATION**

- QUICK ASSISTANCE WITH CRM TRAINING**  
When it comes to training users on your CRM System, having the right documentation can get your organization a long way, enabling self-directed CRM Users and learners while keeping training consistent among your team members.
- ASSIST WITH ONBOARDING NEW USERS**  
Having a playbook for new users makes the onboarding process easier for managers and new Users alike. The ease of access and increased efficiency are immediate training benefits.
- ENABLE PROCESS AND DATA CONSISTENCY**  
This playbook attribute creates accountable Users, and when it comes to CRM, every User should be accountable.
- ACT AS A FUTURE REFERENCE**  
For future upgrades and phases, a playbook will help you to keep track of your history to know where you need to move in the future.



**5 THINGS EVERY CRM IMPLEMENTATION PLAN NEEDS**

- A CLEARLY DEFINED PROJECT SCOPE**  
Here you will understand what's involved in your project. You will know what specific departments will be impacted.
- A PROJECT KICKOFF MEETING**  
Host a project kickoff meeting to introduce Users to CRM and get everyone excited about it. Clearly state the objectives of the project during the meeting while identifying the Who, What, Where, When, Why, and how. Set clear expectations.
- A PROJECT "COMPASS"**  
During implementation, it's crucial to keep your project on track. While long-term benefits may seem more attractive than quick wins, you need to focus on and appreciate those, too. One step at a time!
- AN ORGANIZED TIMELINE**  
Keep your project on time, in the budget and within your project scope when you establish an organized timeline your team can stick to. If the project extends too long, user adoption is negatively impacted.
- A COMMUNICATION PLAN**  
Throughout the project, it's crucial you have an effective communication plan. Communicate your needs to your partner from the start so they can respond to requests and get on the same page.

FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office

FORVIS

33


- 01 | DEFINE YOUR VISION
- 02 | SELECT YOUR PARTNER
- 03 | DEVELOP YOUR TEAM
- 04 | ESTABLISH YOUR PLAN
- 05 | SPECIFY YOUR REQUIREMENTS
- 06 | DEAL WITH YOUR DATA
- 07 | CONSTRUCT YOUR COMMUNICATION PLAN
- 08 | MAINTAIN YOUR DOCUMENTATION
- 09 | KEEP THE MOMENTUM
- 10 | PROMOTE USER ADOPTION

FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office

FORVIS

34

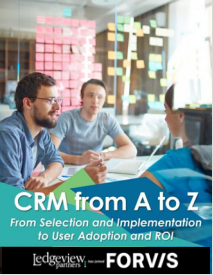
# Resources




**ARTICLE**  
Aug 25, 2022  
[Read More](#)

**Five Tips to Promote CRM User Adoption**

Why is CRM adoption important? It supports data integrity and productivity. Read on for tips to help increase CRM user adoption.



**CRM from A to Z**  
From Selection and Implementation to User Adoption and ROI  
edview FORVIS




**ARTICLE**  
Oct 10, 2022  
[Read More](#)

**Four New Salesforce Winter '23 Features to Know**

Explore these four new Salesforce Winter '23 features your org can start using to help save time and stay organized. Get the scoop here.

Tags: [Digital Transformation](#) [Software](#) [Software Support](#) [Technology Consulting](#)




**ARTICLE**  
Oct 10, 2022  
[Read More](#)

**Customize Lookup Views in Microsoft Dynamics 365 CRM**

Learn how to customize lookup views in Microsoft Dynamics 365 CRM. Here are two options for creating views designed to support your CRM use.

Tags: [Digital Transformation](#) [Microsoft Dynamics](#) [Software](#) [Software Support](#) [Technology Consulting](#)




**ARTICLE**  
Oct 07, 2022  
[Read More](#)

**How to Switch to Pardot Lightning from Pardot Classic**

Organizations using Salesforce Pardot Classic will need to switch to Pardot Lightning by October 17, 2022. Read on to learn more.

Tags: [Digital Transformation](#) [Software](#) [Software Support](#)




**ARTICLE**  
Oct 07, 2022  
[Read More](#)


**Are You Ready to Use CRM & Marketing Automation Together?**

Discover how using CRM and marketing automation together may benefit your organization.

Tags: [Digital Transformation](#) [Microsoft Dynamics](#) [Software](#) [Software Support](#) [Technology Consulting](#)



FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office



35

# Contact



**Chad Collett**  
 Director of Marketing  
 FORVIS Business Technology Solutions  
 Email: [chad.collett@forvis.com](mailto:chad.collett@forvis.com)  
 Phone: 920.560.6882  
**in:** chadcollett



FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office

36

# Thank You!

[forvis.com](http://forvis.com)

The information set forth in this presentation contains the analysis and conclusions of the author(s) based upon his/her/their research and analysis of industry information and legal authorities. Such analysis and conclusions should not be deemed opinions or conclusions by FORVIS or the author(s) as to any individual situation as situations are fact specific. The reader should perform its own analysis and form its own conclusions regarding any specific situation. Further, the author(s) conclusions may be revised without notice with or without changes in industry information and legal authorities. FORVIS has been registered in the U.S. Patent and Trademark Office, which registration is pending.

**FORVIS**  
Assurance / Tax / Advisory