10 Steps to Guide Your CRM Implementation

DISCOVER BEST PRACTICES

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About FORVIS

Services
- Assurance
- Tax
- Advisory

WEBINAR

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*

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Cayman Islands

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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 |

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Presenter

Chad Collett

Director of Marketing

FORVIS Business Technology Solutions

Email: chad.collett@forvis.com

Phone: 920.560.6882

in: chadcollett

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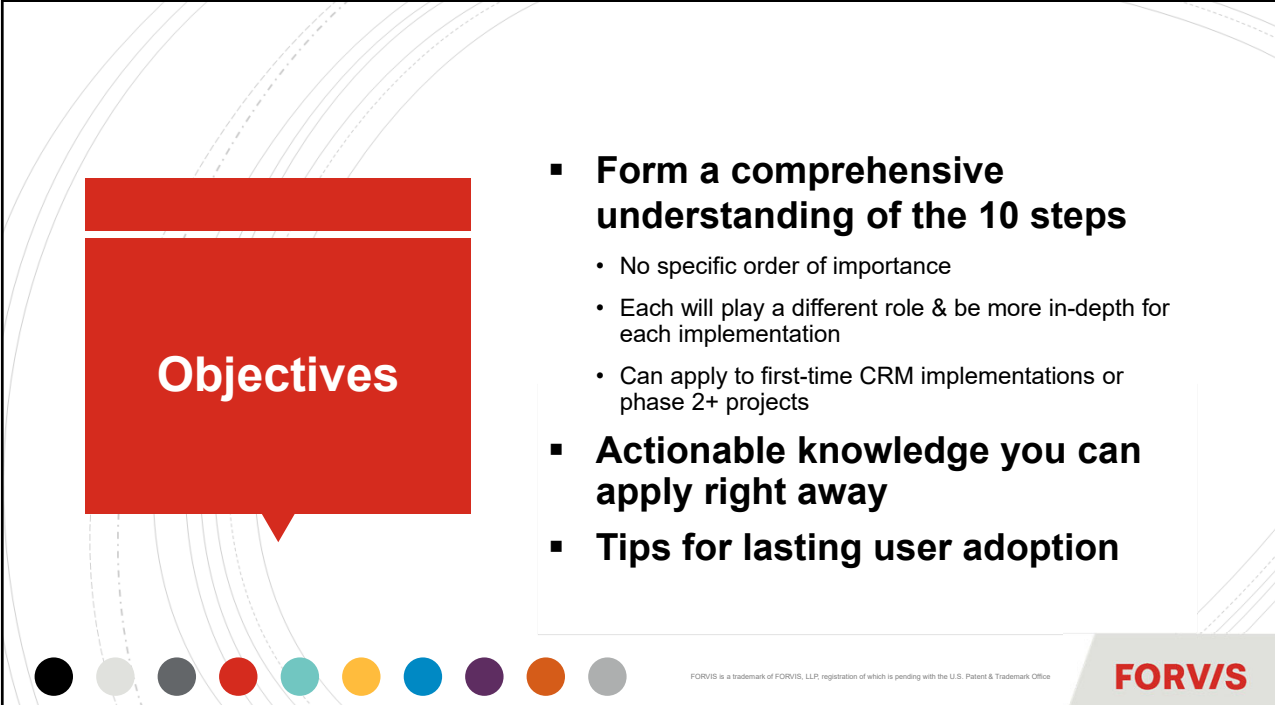FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office

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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**

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#1

Define Your Vision

WHAT ARE YOUR GOALS?

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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

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8

Define Your Vision

9

Partner Selection

#2

DO YOUR VALUES ALIGN?

10

Partner Selection

- Define Your Project Needs

- Define Your Partner Selection Criteria

- Contact Partner References

- Define & Share Partner Expectations

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Develop Your Team

WHO SHOULD GET ON BOARD FIRST?

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Develop Your Team

Purpose of the Team	Involvement of the Team	Size of the Team
• Foster buy-in from the top down	• Involvement at various points	• Team size will vary
• Represent all applicable areas of the company	• Design & requirements gathering	• Organization size & structure
• Discuss the full range of requirements	• Testing	• Scope of implementation
• Promote ownership & usage	• Roll-out & go-live	
	• Post go-live	

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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?

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Establish Your Plan

EVERY CRM IMPLEMENTATION PLAN IS UNIQUE

16

Establish Your Plan

Clearly define the project scope

Start strong with a project kickoff meeting

Keep the project(s) in scope

Establish communication

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Specify Requirements

WHAT DO YOU WANT CRM TO DO?

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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?
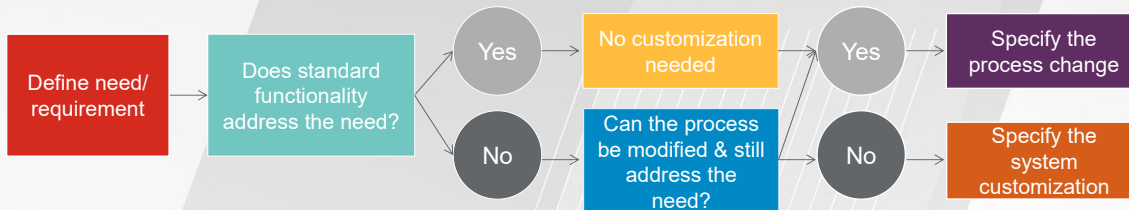- Which are most important?

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Specify Requirements

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

| Define need/ requirement | → | Does standard functionality address the need? | → Yes → | No customization needed | → Yes → | Specify the process change |
| | | | → No → | Can the process be modified & still address the need? | → No → | Specify the system customization |

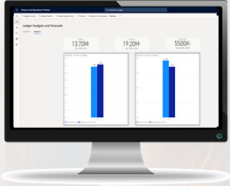FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office
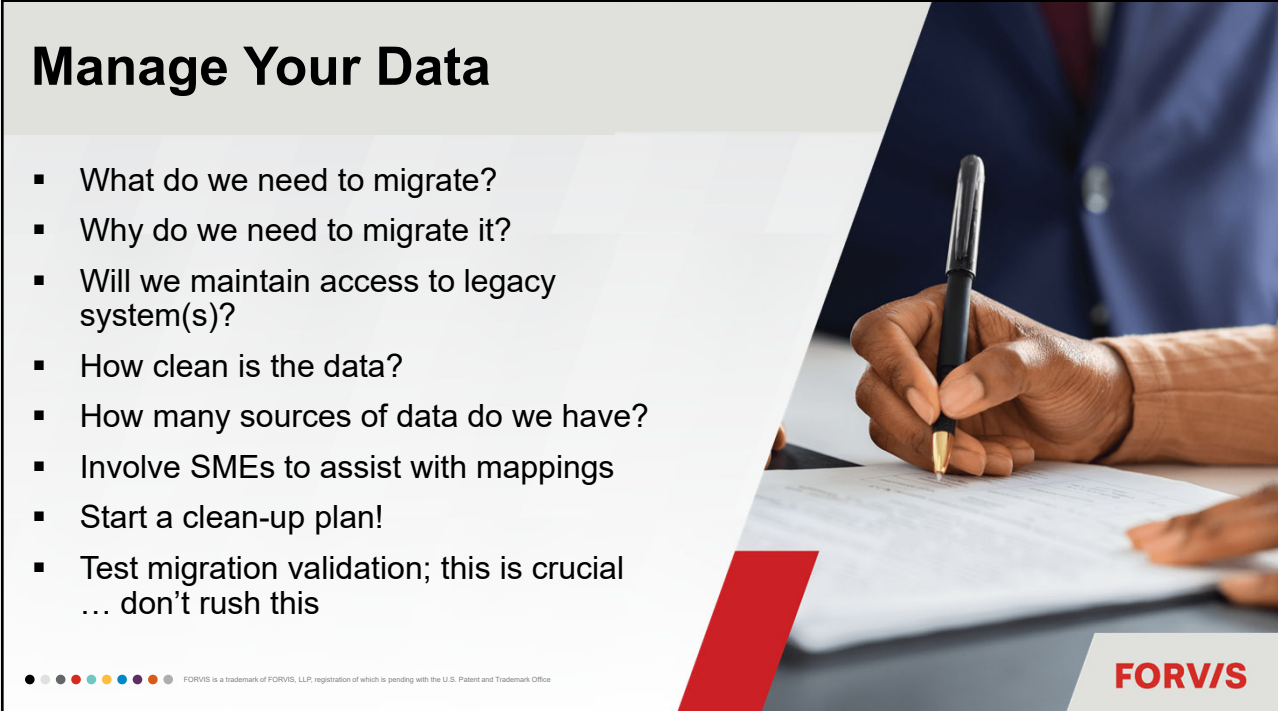
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21

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

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

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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?

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Communication Plan

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

26

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

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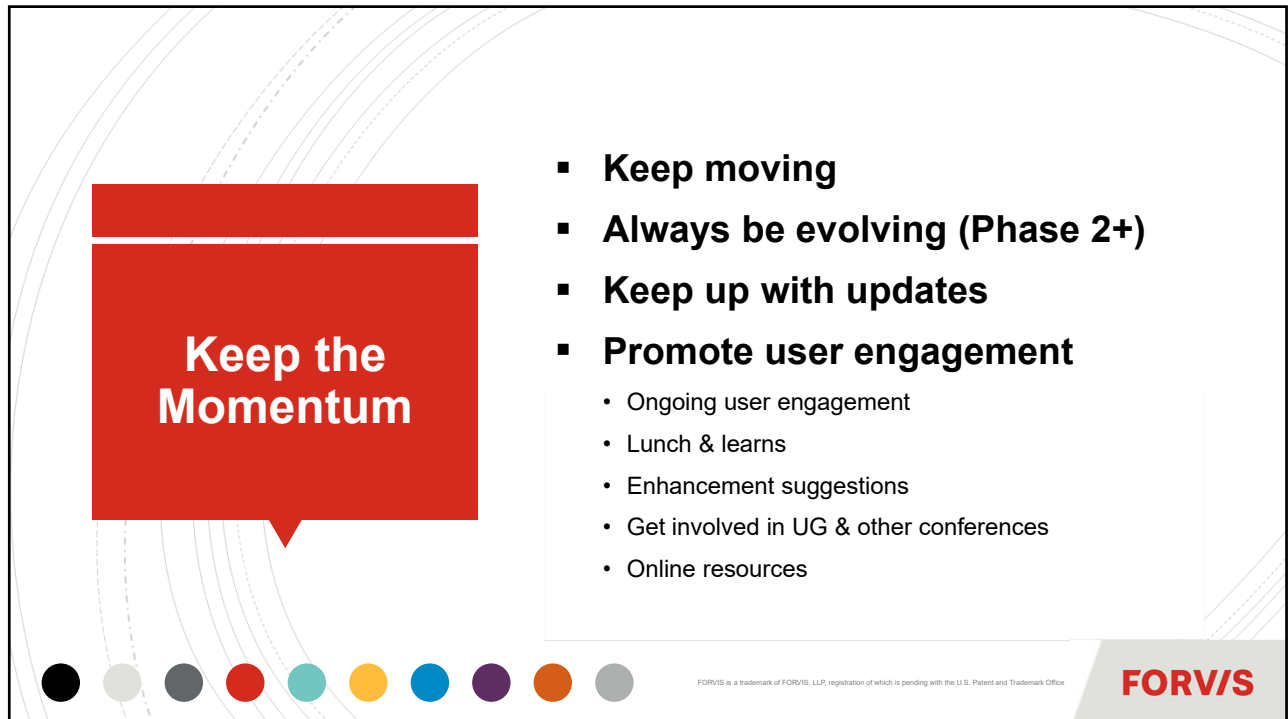
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29

- **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

30

User Adoption

THE MOST CRITICAL PART OF YOUR CRM IMPLEMENTATION

#10

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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

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User Adoption

10 CRM MYTHS + MISCONCEPTIONS to Debunk with Your Team

123K

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 them excited about it. Clearly state the objectives of the project during this meeting while identifying the Who, What, Where, When, Why, and How. Set User expectations.

A PROJECT "COMPASS"
During implementation, it's crucial to keep your project in scope. 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 too. If the project extends too long, user adoption is jeopardized.

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.

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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

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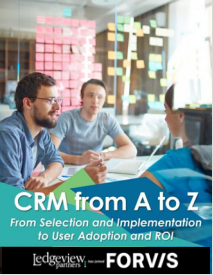
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35

Contact

Chad Collett
Director of Marketing
FORVIS Business Technology Solutions
Email: chad.collett@forvis.com
Phone: 920.560.6882
in: chadcollett

36

Thank You!

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