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Your CRM. Quality Matters.

10 Success factors for a CRM project

About this e-book

A new **CRM implementation** can be quite challenging. Wrong choices and a wrong project approach can result in a loss of time and resources. Of course you want to avoid that the CRM solution doesn't meet your business objectives and expectations.

Based on our experience, we wrote this e-book about the **key success factors** for a **great CRM project**. This e-book will inspire you to make your CRM strategy and project a success.

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Know what you want to achieve

A clear CRM strategy

Customer Relationship Management (CRM) is a strategy where you put your customers first, in order to achieve your business objectives. **Firstly, you need to define what you want to achieve with CRM**. Do you want to increase turnover with your existing customers? Do you want to sell more and more efficiently? Do you want to work more productively and consistently by automating customer processes? Do you want to focus on delivering a better customer experience? Which aspect of your current way of doing business do you want to improve?

Implementing CRM in your organization is not about installing a CRM tool and giving everyone access. **Preparing and planning is essential.** Therefore, provide enough time **to define the scope of the project**. Make a complete description of the business requirements related to CRM. During this preparation phase, you analyze the current business processes and pain points of your company and you define what needs to improve. **A succesful CRM project results in a new, improved way of working. So, think carefully about what needs to be changed to achieve your business goals**.

Some questions to get you started:
- what is currently going well and what is going wrong?
- which business processes must/should/could be improved?
- what do you want to achieve with CRM? How do you define success?
- how can you improve the customer experience?
- for which administrative tasks is automation possible and desirable?
- which information do your employees need to be able to work optimally?
- what is business-critical and what is less important?
- which departments are most in need of CRM?
- which performance indicators do you want to monitor?
- which problems do you aim to solve?

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3

Determine the outline of the project and make a list of the **must-haves** and **nice-to-haves**. If this list gets very long, don't try to realize everything at once. Create a roadmap and work towards your goals step by step.

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A common mistake is that businesses want to do everything at once. However, it's important to define priorities and start with what's most important. Create focus by defining clear business priorities. With a step-by-step plan, you maintain control over your CRM project.

With CRM software you can expand the solution in a modular way and in various phases. In the first phase, it is better to focus on the "**business critical**" requirements. You can bring along the "**quick wins**" which make people enthusiastic about the new CRM application. In the following phases, you can further expand and refine.

Diagnostic

Many companies and organizations struggle with clearly defining the objectives of CRM. Then it can be useful to have a **diagnostic** carried out by the CRM partner of your choice.

During a diagnostic phase, business consultants ask the right questions to discover the pain points in your business processes. They describe your current working method and outline the way in which your organization can work smarter and achieve better customer experiences. The result of a CRM diagnostic is the blueprint of the CRM implementation listing the specific challenges in your organization that will be addressed.

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4

Define from the start how you will monitor results

The implementation of CRM is a significant investment and of course you want to measure the **Return On Investment (ROI)**. That is why it is important **to determine a set of "Key Performance Indicators" (KPI's)**. Performance indicators are always linked to specific operating processes and business objectives. A KPI without context sometimes means very little. To discover the right KPI's, you need to ask this question: what will have changed if your company achieved the described goals? Imagine how the impact can be measured.

To give a very simple example: your goal is to increase sales. Then the total sales figure would be of course the designated KPI. It becomes a little bit more difficult if it is your goal to increase the customer satisfaction. You then ask yourself: what will have changed if my customers are more satisfied? This will probably be reflected in a decrease in the number of complaints about your services. The number of complaints (per month, per quarter, per year) could be a good KPI in this case.

Limit the number of KPI's to avoid losing the overview.

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5

Work together with a CRM partner

A CRM-project is about a good collaboration between the customer and the CRM partner. A sucessful project does not rely on a supplier-customer relationship. You're on the same side. To realize the set goals (scope, time and budget), **it is necessary that everyone works together in a team.** Communication and transparency are therefore very important. Only by working together, you will achieve the best results. Also the choice of a CRM partner plays an important role. Choose a partner you feel comfortable with, **who understands your business and thinks along with you**, who has experience with change management and who guarantees a structured project approach.

Structured project approach

Good project management ensures a structured approach to your project with a focus on quality. An experienced CRM partner will help you by making a realistic picture of the possibilities based on the foreseen budget within a defined time frame.

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6

Communicate clearly about the benefits of CRM

Communication plan

It makes no sense to implement a CRM project if there is no top-down and bottom-up support for it. **Communication** is the way to create that support within every department of your organisation. Announce the CRM project well in advance and communicate regularly about the progress.

Create a **communication plan** and describe the DONE and TO DO's, milestones, rollout and planned training. Does the rollout of CRM take place in different phases? Then work on a roadmap that everyone understands.

A sucessfull CRM-project must primarly be involved and inspired by the entire management. Management plays an important role in ensuring support within the whole company.

"What's in it for me?"

Make sure everyone in the organization understands why a new way of working with CRM is needed. Make it clear to your employees how CRM will help them in fulfilling their job and what the benefits are for customers. Explain that CRM provides an answer to their specific work challenges. Focus on the specific benefits of each type of user, because everyone will ask: **"What's in it for me?"**. Set the right expectations and fulfill them.

Our salespeople realize the need of CRM
to do their job successfully.

\- Hans Steenbreker, IT Director Vasco Group nv

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7

Internal follow-up of the project

Right CRM project team

Bring together an **internal project team** within your organization for supervising the CRM project. Typically, the time investment on the part of the customer is **one and a half time greater than** that of the implementation partner. Take this into consideration while planning.

Shortly after the analysis, two people from the project team left the company of our customer. This was the reason why the internal vision of the CRM objectives were nog longer the same after the first roll-out phase of the project. We organized an "alignment meeting" and discussed again about the initial set-up of the project.

The **stability of the project team** is extremey important. When team members are replaced during the project, this can result in a change of the scope due to different visions. If this happens, it is important that you re-evaluate the business goals you want to achieve with CRM. Also inform your CRM partner immediately because of the possible impact on the entire project. How far-reaching that impact is, will become clear during analysis workshops.

Choose the right people

Put the right people in the right place. Knowledge and experience are very important for the success of the CRM project. Everyone within the project team must know their own role and responsabilities and must be able to fulfill it.

For example, you can indicate **"subject matter experts" (SME's)**. These are people who know the operation (or a part of it) and working processes of your company very well.

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8

SME's are key persons within your company who are able to think independently about the optimization of current working processes. They know the working of the company in detail and are open to new ideas. Usually process managers are the designated persons to fulfill this function. However, in some cases the employees who carry out the processes on a daily basis know better how to handle things effectively.

The SME's provide input about the desired working of the CRM system. At the start of the project, they receive functional training and learn about the building blocks of CRM. With this knowledge they will be able to imagine how the desired solution will work and look like.

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The combination of business expertise and technical knowledge of the CRM system is necessary to be able to imagine how CRM can improve your business.

CRM-administrator

Appoint also in your organization a **"CRM-administrator"**. This person preferably has a (semi-) technical profile.

The purpose is that this person is responsible for the day-to-day management of the CRM solution.

Of course, this person will receive the necessary training from your CRM supplier. Your own "CRM-administrator" is also the technical point of contact for your CRM partner.

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9

In addition, you need an **internal manager who will lead the project**. Look for an enthusiastic person who has an analytical mind and an eye for detail and who can communicate well. The project manager monitors the entire CRM project very closely and is the first point of contact for your CRM partner. As a result, communication between both parties is streamlined.

Close follow-up of the project

Schedule regularly **steering meetings**. These are **consultation moments between the internal decision-makers, the key people of the project team and your CRM partner**. View the **status of the CRM-project in relation to budget and planning**. Are there any adjustments needed in terms of content or technically? What is going well and what is not going well? What are the possible risks to be taken into account? This is the opportunity to discuss such things. Don't forget to speak also about the human aspects of the collaboration and to smooth possible problems.

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10

Focus on user-friendliness

User-friendliness is so important for any software application. Because the **user experience** is central, design a solution that feels **familiar** and **performs well**. Look always for a **balance** between your reporting needs and the administrative tasks for the users.

Make your CRM solution as user-friendly as possible. Apply the **KISS ("Keep IT Simple, Stupid")-**principle. Look for an intuitive, streamlined interface. For example, do not display more buttons or options than necessary to avoid confusion. Take into account the number of clicks a user will have to do for a certain action.

Keep It Simple

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11
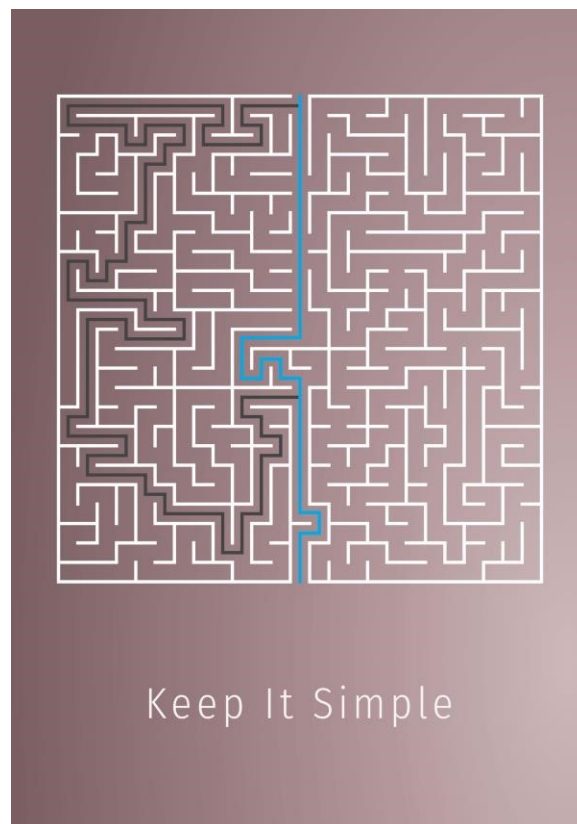
Choose the right CRM technology

Choose a **CRM platform** that evolves and innovates. A CRM solution with an active user and developer community (such as Microsoft Dynamics) is ready for the future and continues to pay off in the long term.

Get started with the following questions:

- are there vertical solutions for your sector so that you can start with a head start?
- are there integration possibilities with other desired applications and external data sources?
- does the system contain built-in intelligence for automatic insights?
- does the software provide optimal mobile support?
- is the platform quickly and easily scalable in the future?
- is the tool flexibly adaptable to your specific needs?
- what will be the expected annual total cost of the CRM system?
- how will be the maintenance of the application?
- how many implementation partners are there for this technology?
- what about the available support services once you use the tool?
- how strong is the portability of your data?

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Not only focus on what is needed today, but also what is needed to grow your business in the long term. Look for CRM technology that is flexible and scalable.

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12

Invest in training and coaching

For the CRM project to succeed, your employees must understand why Customer Relationship Management is needed and what are the objectives. They need to know what is expected and how the software works. Only if the CRM system is used in a consistent manner, it will get its full potential. **Therefore, provide enough time for training for each type of user.** During a training, everyone learns the guidelines to work correctly with the CRM tool.

A succesful CRM project requires the necessary training. The quality of your CRM data depends on the level at which your users control the system. In addition, training is extremely important to ensure a smooth transition to the new way of working.

Specific CRM training

You can ask your CRM partner for specific CRM training. At the start of the project, it is recommended to follow a **functional training** that explains the basic principles of CRM. You learn how the system works and what are the possibilities for your organization.

Employees who will take care of the daily management, can follow an **administrator training**. They get to know the more technical side of CRM. They are trained to be a "**super-user"**.

Don't forget to organize regular refresher courses for all your employees who work with the system. Of course, don't forget to provide a training program for new employees.

Train-the-trainer principle

As a CRM partner we recommend the "**train-the-trainer"** principle. This kind of training allows you to prepare an employee as a teacher who can spread the knowledge within your organization. Ideally, the trainer is someone who knows how people currently work and can answer questions about the new way of working in the CRM system.

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13

Provide support after the go-live

After the go-live of the CRM tool, make sure your users have the necessary support if needed, such as the help from a CRM administrator or a CRM helpdesk.

A **CRM Service Desk** offers help for both functional user problems and technical problems. Be sure to check whether your CRM partner has its own Service Desk your employees can count on if they are stuck or when problems arise. This Service Desk can then provide remote support via telephone or screen capture. If needed, they can come on site. This way, the CRM tool can always be used optimally and business continuity is assured.

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It is not always easy for our employees to digitize their daily tasks. Permanent support with the digitization by Net IT ensures that the transistion remains feasible for everyone.

- Gert Deryckere, Secretary Destelbergen

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14

Successful CRM implementations continuously improve

Evaluate the solution

After the go-live of your CRM system, it is also important that you set an **evaluation period of at least 6 months**. Do not immediately listen to the comments from employees on certain functionalities. They must have the opportunity to work with the tool for a certain period of time.

During this evaluation period, **you collect all the feedback**. After a detailed evaluation, you can decide to adjust certain things in the system.

Invest in the future

Because the needs and challenges of your company are constantly changing, it is normal that you want to adjust processes or add new functionalities in your CRM system over time. A well-defined scope makes it possible to quickly and easily expand and add new automations. **As your business evolves, also your CRM system.**

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15

10 success factors: summary

◉ 1   Know what you want to achieve

◉ 2   Define from the start how you will monitor results

◉ 3   Work together with a CRM partner

◉ 4   Communicate clearly about the benefits of CRM

◉ 5   Internal follow-up of the project

◉ 6   Focus on user-friendliness

◉ 7   Choose the right CRM technology

◉ 8   Invest in training and coaching

◉ 9   Provide support after the go-live

◉ 10   Successful CRM implementations continuously improve

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Would you like to know more?
Tell us your story.
We are happy to assist you.

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Net IT is the largest independent Microsoft partner in Belgium. We are specialist in the development and implementation of intelligent business applications with Microsoft Dynamics 365 Customer Engagement (CRM), Microsoft Power Platform and Microsoft AI.

We help companies and government organizations to work smarter, improve customer experiences and gain actionable insights from data. Our team of talented professionals delivers top quality projects. Every consultant at Net IT is Microsoft certified.

As a Microsoft Tier 1 Cloud Solution Partner, Net IT has its own, unique Service Desk. We also have an Advanced Support Contract with Microsoft to offer our customers the best possible support.