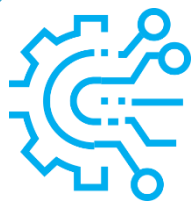YOUR STEP-BY-STEP GAME PLAN
TO A SUCCESSFUL CRM JOURNEY

3 KEYS TO A SUCCESSFUL CRM INITIATIVE

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Introduction

The hard truth is that like many complex IT initiatives, CRM projects often fail. You may have even experienced a failed CRM implementation or two.

At Alithya, we've helped hundreds of companies successfully implement CRM software, and there is one very simple concept that all super successful companies understand:

LASTING CRM SUCCESS HAS MORE TO DO WITH HOW THE ORGANIZATION THINKS ABOUT CRM THAN THE TECHNOLOGY YOU USE OR THE MONEY YOU SPEND.

The companies that are the most successful with their CRM implementations view the initiative as someplace the company is going, not just software to install and maintain like Microsoft Word or Excel. These companies think of the software as a strategy or business outcome execution engine. For them "Go Live" is the start of the journey, not the end. They have a game plan for a successful implementation. We like to call these companies High Performing Organizations (HPO). You may be familiar with the concept of an HPO.

WHAT IF YOU ARE IN THE MIDDLE OF A PAINFUL, FAILED CRM IMPLEMENTATION NOW?

THE GOOD NEWS IS THAT, WHILE EVERY ORGANIZATION SHOULD FOLLOW A GAME PLAN FROM THE OUTSET OF THEIR CRM JOURNEY, IT'S NEVER TOO LATE. YOU CAN INSTITUTE A GAME PLAN ONTO YOUR EXISTING FAILED CRM IMPLEMENTATION AT ANY POINT. INSTEAD OF SWAPPING OUT FOR NEW TECHNOLOGY, FOCUS ON PUTTING THE RIGHT APPROACH IN PLACE RIGHT NOW—NO MATTER HOW BLEAK THINGS MAY SEEM—AND YOU CAN DRIVE THE SUCCESS THAT YOU WANT FOR YOUR CRM IMPLEMENTATION.

ALITHYA'S HIGH PERFORMING ORGANIZATION (HPO) MODEL

At Alithya, we've taken this concept a step further by creating the HPO model to help you organize resources and schedules to support CRM initiatives.

This game plan includes three main components:

1. An organizational structure that includes:
   > The Leadership or Executive Team
   > The Core Team of Subject Matter Experts (SME's)
   > The CRM Project Team/Administrators

2. A training system that consistently delivers:
   > Role based training (persona, positions, etc.)
   > Solution experience level appropriate training
   > Multiple types of training (application, process, reinforcement)

3. A cadence of accountability:
   > Scheduled meetings that include the Core Team and Admins
   > Scheduled meetings with the Leadership/Executive Team
   > The model supports the initiative and allows the organization to drive incremental changes to both the system and the overall strategy indefinitely.

There are three things that you see in every HPO:

> **Adoption**. Adoption comes from two places primarily. It comes through leadership engagement, and training; specifically, how well you train your users. With both of these factors, ultimately it's critical to understand CRM adoption rates from a universal, historical standpoint, and then more explicitly, the rates from your team.

> **Productivity**. Productivity means that CRM is more than just entering data on a form, or something that you're doing so someone can get their report. It becomes more than a tool, it's a way of doing business.

> **Employee satisfaction**. CRM should not be something that you and your team dread. It's not something that they feel like they're using completely for someone else. It becomes a part of their DNA.

CRM Success Key #1: Organizational Structure

The triangle below depicts the three primary components of an HPO organizational structure including the executive leadership, the core team and CRM admin.

LARRY BOWERS

GLOBAL CRM PROJECT LEADER, AVENTICS
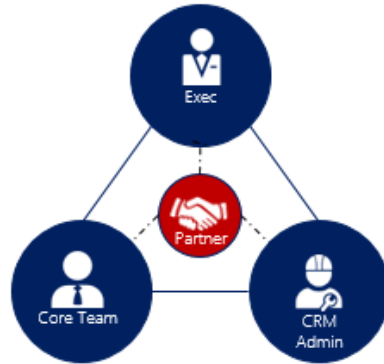
Executive buy-in was necessary for us to be able to commit to funding the project, rolling it out, and actually consuming the data that's being created from the top down.

LEARN MORE BY WATCHING THE VIDEO

EXECUTIVE LEADERSHIP

The first component of the org structure is executive leadership. Typically, there is a leadership or executive team that is directly responsible for the initiative - this team often includes the CEO or Owner. Executive leadership tasks include:

> Formulate the overall CRM strategy and targeted business outcomes

> Communicate the CRM strategy and business outcomes to the organization

> Reinforce the non-negotiable nature of CRM use to help drive adoption; and

> Ensure that there is regular measurement and feedback related to adoption, tactics and business outcomes

In our review, we have found that there is a direct correlation between the level of executive engagement and long-term success. The more engaged leaders are - the more success they have. Leaders should constantly ask themselves:

> What are we trying to accomplish?

> Are we able to get there?

> How are we getting there?

If your CRM system is not helping your organization accomplish these business outcomes, adjustments must be made. One of the most common areas of improvement that organizations are looking to achieve in their CRM journey is to get closer to their customers and drive more loyalty and ultimately more revenue. Typical business outcomes are increasing revenue from current customers, increasing the number of products/- services per customer and increasing renewals of customer contracts or subscriptions. Your business outcomes may look a little different though, and that's ok. This process is intended to evolve over time. The point is, you are in control of the process.

CORE TEAM

The second component of the HPO structure is a core team. When CRM is implemented, many companies assemble a team of Subject Matter Experts (SME's) representing various parts of the business. In high performing organizations, the core team is an ongoing construct. The members may change, but there is always a group of business SME's that have CRM as part of their job.

A key attribute of the members of this team, in most cases, is that all the members of the core team are what we call power users. They have a deep knowledge of CRM functionality—not administration or configuration—but how it is used and what it can do right out of the box.

The obvious benefit is that they are more productive and better able to help others understand it. Because they understood how CRM works, they could work and communicate more effectively with their CRM administrators to enhance the system without custom development. They were also able to identify other areas in the business that could benefit from CRM with little effort.

LEARN MORE BY WATCHING THE VIDEO

"Alithya helped us start our project with determining the business outcomes. They helped us ask and answer - what did we want to deliver, how are we going to do it, how do we build stakeholder engagement, how many people are going to not only be involved but benefit from this strategy. We built a business case that made sense to many people internally, it changed the way we think. We don't think about buying CRM from Alithya, we now think about the business partnering that we have with them."

COMMUNICATION

As the primary interface to the organization, these core team members are a key driver of adoption. The core team is a communication hub in many ways.

They have a ton of responsibility, and it never ends. They're constantly taking in information, understanding how to push that out into the organization; staying up to speed on whether the strategies and objectives are changing and what they need to do around it. It's an ongoing job. It is not a full-time job, but it does require ongoing effort.

CRM ADMIN

The third component of the HPO structure is the concept of a strong CRM admin (or admins). In HPOs, the admin focuses on more than the "technical" aspects of the initiative, they also understand what the business is trying to accomplish and why. They receive this understanding through regular communication with the core team.

That is not to say that they are not technical. The best admins have a deep understanding of CRM's native configuration capabilities. In some cases, they have a development or data background, but that is not a prerequisite. It is critical that they understand how anything external (ERP, Portal, etc.) is connected to CRM whether they are responsible for building and maintaining it or not. Another common practice for these admins is that custom development is a last resort—not a first option. Many have spent time struggling to maintain or upgrade over-developed solutions and realize the trouble it can create.

It is important to note that the organizational structure that we are talking about is not project-based. Many companies create a structure like the one above, but then disband it once the installation "project" is complete. In the HPO Model, installing the software is not THE objective. The software is one of several tools to support the objective and because of that, this mindset is critical.

They communicate with:

> Leadership to understand the strategy and desired business outcomes

> CRM admin(s) to deliver requirements to be configured

> Themselves to keep the roadmap aligned with the needs of the organization and

> Also, with their stakeholders and the user community

THE DIFFERENCE IN THESE HIGH PERFORMING ORGANIZATIONS IS THAT THEY VIEW CRM AS AN INITIATIVE NOT AN INSTALLATION.

CRM Success Key #2: A Training Plan

When it comes to CRM adoption, you must have a solid training plan. Let's look at the most common training miss-steps to avoid, and then the top training considerations.

5 COMMON TRAINING MISTAKES THAT DERAIL YOUR CRM SUCCESS

Let's walk through the five most common mistakes that we see organizations make that keep them from becoming HPOs:

1 Little to no training. Often, organizations don't train at all, or very little, because they assume that the software's going to be easy enough that their people are just going to get it and understand it. That's a mistake; that's not how it works.

2 Go-live only training. Sometimes organizations train just at go-live with training that is specific to the software, the same way that they might train Word or Access, and that's all the training that their users get.

3 No training plan. Even if a business delivers some level of good training at go-live, they don't have a plan for how their users are going to improve usage over time.

4 No training analytics which means no training validation. Another big mistake that companies make, is not having a method for gauging whether the users are understanding CRM. Or, they haven't rolled training out in a way that they can validate that the users understand.

5 Training that is not role-specific. We commonly see that businesses don't provide training that is specific to the person, to what they do in the organization. They might provide training, but its generic - the same for everybody, which won't drive you to the "best performing" category.

Now that we've looked at what to avoid, let's cover the three things that a HPO does, and how they think about training.

PERSONA TRAINING

The first is persona, which is "Who is the person that I'm training"? Do you provide training specific to the role, to the position, to their level in the organization? The way that you train your manager should be different than the way that you train your users. The way that you train someone who works in service should be different than the way you train someone that works on sales. And of course, there's overlap, but there should be some specificity to what you're going to roll out to those people.

EXPERIENCE LEVEL TRAINING

The next type of training HPOs focus on is experience-level. When you train at go-live, there's a certain amount of information that's important to you, that you need to know to do what the organization needs you to do. But beyond that, you may be three months in, or six months in with more experience. This is the time where you can become productive in the system, but only if you're getting the appropriate level of training. And when you think about experience, also think about what happens to the new hire. In many organizations, the new hire gets 15 minutes, with the person sitting next door. When this happens, the new hire loses all the nuance, and all the reason, and all the in-depth training that the others had. So, you want to think about the experience levels that you want to train to.

Along with experience training, you want to think about the type of training that you're offering. So, of course you want to train on the application, with application-specific education to answer questions like:

> How does it work?

> How do I open a form?

> How do I move from stage to stage in an opportunity?

Those are important, but what about the process? Think about what you're introducing. In many cases, this will be the first time everyone has seen the sales process altogether. Little mistakes like not actually training to the process can mean that you end up with bad data. As an example, if everybody thinks that "qualify" means something different, when you're looking at this brand-new pipeline that you've created, you have numbers that don't mean anything. Then, you must pedal your way back into having information that makes sense.

MOTIVATIONAL TRAINING

And the third type of training that HPOs use is reinforcement or motivational-type training. This is the training where the CEO talks to the organization about why the change is happening, and what the target outcomes are, and the fact that CRM is not optional. This is what makes the initiative real. Not the software, the initiative, because everyone can engage now around a conversation from leadership that matters.

CRM Success Key #3: Cadence of Accountability

Cadence is the rhythm that you establish to keep your initiative moving forward. There's an old quote by Peter Drucker that says, "*What gets measured, gets managed.*" Over time, that quote has morphed into, "*What gets measured, gets done.*" Either version is as true today as it was then.

However, High Performing Organizations add a step to that because they think about scheduling in the exact same way. They know that if they don't set aside time to focus specifically on their initiative, it will get lost in the whirlwind of everything else that it takes to keep their business running from day to day. So what kinds of meetings are they having? There's two basic types – tactical and strategic.

TACTICAL MEETINGS

The first is a more tactical meeting, that meeting includes the CRM admin or admins and the core team, the subject matter experts. They usually meet at least monthly, but sometimes, especially right after a release it may be more frequent, perhaps weekly until things stabilize.

In these meetings, they hit on a few topics regularly including:

> Overall user adoption of the system. How are we doing overall as an organization?

> Then they drill into the tactics, how is the organization doing against the tactics that were defined, the things that we're trying to do, to change, to move the organization.

> They also hit on any technical issues that need to be addressed, or user feedback that they're getting.

STRATEGIC MEETINGS

The second type of meeting is a strategic meeting. This involves the leadership or executive team. They meet less frequently, usually once or twice a year, in most cases. They key point here is that the meeting is specifically about the CRM initiative; it is not a bullet point or add on to some other meeting. The meeting focus is on business outcomes.

They ask:

> How are we doing against the outcomes we defined?

> Are we moving in the right direction?

> Do we do more, less, or something altogether different?

They also talk about CRM-related investments including upcoming projects, or any equipment they might need to buy and upgrades that need to happen.

Additionally they cover communication. Remember, leadership is responsible for reinforcement and communication of their vision throughout the organization.

MOVEMENT. ACCOUNTABILITY. PROGRESS.

The purpose behind all these meetings is to accomplish two objectives:

1   Develop momentum and keep things moving forward. For every topic, there are associated tasks. Each task should be owned by someone on the team, and it should include a planned completion date.

2   The meeting structure allows team members to hold each other accountable for progress. We have all been to great meetings with lively discussion and lots of agreement—but no follow through. The goal is not to meet—it is to make progress week over week.

An initiative is an ongoing process. It doesn't end at Go Live; that is just the beginning. The cadence you establish will determine how much focus your initiative gets and ultimately how successful you will be. Lack of cadence leads to lack of focus. An initiative with no focus is doomed to failure.

Bringing It All Together

From an internal perspective, the three secrets above are how HPOs structure themselves to support their CRM initiative.

But how do HPOs relate to their CRM partner?

VIDEO SERIES:
What Companies Value in Choosing a CRM Partner

PATRICK LEWIS
DIRECTOR OF BUSINESS OUTCOMES

A REAL-LIFE EXAMPLE OF CADENCE: END-TO-END REVIEW

LARRY BOWERS GLOBAL CRM PROJECT LEADER, AVENTICS

When I look back on the project and critique myself, (I'm probably my worst enemy in these scenarios), I think we should have done more to incorporate the end-to-end review. I know now that we did not take full advantage of the guidance provided to us by Alithya and that we should have taken more time to drive this topic home when we first kicked-off our phases. We already knew we had a significant challenge in front of us given the multiple languages and cultures we had to contend with.

The end-to-end review is a vital component to properly develop training videos, documentation, and overall process clarity. We clearly understand now that following this concept would have saved us days of time and confusion we experienced after the rollout.

My advice to future rollout teams: Take a break, go back to the end-to-end review, and make sure that every process is known. Define ownership for every process, and make sure that these are known and agreed upon both within the project team but most importantly within the organization. It is especially important to address all processes from Lead qualification to how the Dashboards are used and consumed.

A strong relationship with their software partner is critical, but just as important is the concept of ownership. In the early phases, the partner is very involved in the details as the internal team is learning how to be an HPO.

Over time though, the partner relationship becomes less hands-on. The partner is there to help them with strategy, best practices and understanding the product roadmap. The partner also becomes a coach, helping to the team to use the tool to stay accountable to each other and their strategic objectives.

Of course, the partner provides support and technical assistance when tasks or problems arise that the organization cannot solve on their own. The key to success in the HPO Model, is that you own your solution and your initiative.

If you are building a business case for a successfully deployed CRM, or to get your CRM deployment back on track, contact Alithya for more CRM adoption insights.

ABOUT ALITHYA

ALITHYA DELIVERS INNOVATIVE MICROSOFT ERP, CRM, BI AND DIGITAL SOLUTIONS AND SERVICES ON PREMISE OR IN THE CLOUD TO COMPANIES IN NORTH AMERICA AND EUROPE. THE AWARD-WINNING COMPANY IS ONE OF THE LARGEST RESELLERS OF MICROSOFT DYNAMICS 365 (FORMERLY DYNAMICS AX AND CRM). WE ALSO OFFER STRATEGIC CONSULTING DELIVERING A BLEND OF CLASSIC AND PRODUCT-BASED CONSULTING SERVICES THAT HELP CLIENTS REDUCE COSTS, IMPROVE PROCESSES AND INCREASE REVENUE THROUGH THE JUDICIOUS USE OF TECHNOLOGY.

WE HELP SALES, MARKETING AND SERVICE LEADERS AND TEAMS IMPROVE AND AUTOMATE THEIR PROCESSES THROUGH TECHNOLOGY. WE ALSO HAVE UNIQUE ADOPTION AND TRAINING SERVICES TO ENSURE YOUR ORGANIZATION UNDERSTANDS AND EMBRACES THE LATEST TECHNOLOGIES, ULTIMATELY DRIVING SALES ENABLEMENT AND BEST PRACTICES. **LEARN MORE**.

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About Alithya

ALITHYA GROUP INC. IS A LEADER IN STRATEGY AND DIGITAL TRANSFORMATION IN NORTH AMERICA. Founded in 1992, the Company counts on 2,000 professionals in Canada, the United States and Europe. Alithya's integrated offering is based on four pillars of expertise: strategy services, application services, enterprise solutions and data and analytics. Alithya's Microsoft practice covers a wide array of capabilities, including Dynamics, Azure, business and advanced analytics, digital solutions, application development and architecture.

www.alithya.com | MSsales@alithya.com | 866 420-7624