Strategies for a Successful CRM Implementation

A Guide for Small and Medium Sized Enterprises

An Epicor White Paper

EPICOR®

Abstract

Implementing customer relationship management (CRM) can be a precarious undertaking. It is filled with uncertainty and change. Hidden obstacles lurk around every corner. Implementing CRM isn't just a job—it's an adventure! And we haven't even started talking about software yet.

Because implementing CRM is an adventure, we cannot give you step-by-step instructions like you might use to put together a "some assembly required" birthday present on the night before your child's birthday. The key elements to CRM implementation success include both principles and tactics—but there is no one right way.

Since you are reading this document, we will assume you have some familiarity with CRM in general. If you have been following the CRM technology market for any period of time, you may have heard the ongoing discussion about CRM implementation failures. This issue has been mused upon and shouted with alarm at various points in recent history. In spite of the warnings and analyst statistics, in general, most organizations agree that customer satisfaction (one measure of CRM success) improves when CRM is implemented.

This document is designed to give you a better chance of successfully implementing CRM software solutions. In the end, CRM is not just about technology; it is about people and processes—supported by technology. While this document is about implementing technology, we will be discussing important prerequisites to finding and installing CRM technology. Those prerequisites will focus on people and processes.

Our focus will be on implementing CRM software in small to medium sized organizations. As a long time leading provider of enterprise applications focused on small to medium sized businesses, Epicor is cognizant of the fact that you do not have a large IT staff or a huge implementation budget to dedicate to your CRM project. You need an implementation methodology that you can accomplish with the resources you already have in place.

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Keys to CRM Implementation Success

Let's face it, change is hard. And implementing a new software system changes things: work habits, what people have to know, how people interact, who controls information, and accountabilities, among other things. You are undertaking this project because you believe this will be a change for the better for your organization as a whole. In the final analysis, however, the system will only be successful if it is fully accepted by your CRM users. To ensure user acceptance—and a successful implementation— follow the change management strategies described below.

Executive Sponsorship

Assign a senior executive who is committed to the project, stays informed, clears roadblocks, allocates resources, manages saboteurs (people invested in the status quo), and acts as cheerleader for the project. Without an executive sponsor, implementing CRM is like Sisyphus of Greek mythology who was condemned to rolling a rock up a hill, until under its own weight, it rolled back to bottom and Sisyphus had to start pushing the rock uphill again.

Project Team Commitment

Include the right people, give them the time and authority to complete project tasks, and make sure all team members are committed to the project's success. This is particularly important in small to medium sized companies where most or all of the project team will be assigned this project in addition to their existing duties. Make sure that team members are allowed to spend the appropriate amount of time to make the project a success.

Project Manager

Assign a strong Project Manager with a business focus of Customer Service and/or Sales and Marketing. While IT departments often manage these projects, the bulk of the decisions that will be necessary for successful implementation will be related to business processes rather than software, hardware or network.

Planning and Business Process Analysis

It is tempting to skip all the preparation and jump right to the implementation. DON'T! Take an enterprise-wide approach and consider the entire customer life cycle. Use a "Model Office" installation to test your business processes against the unmodified CRM software and determine where to change processes and where to customize your chosen solution. During the Model Office Review, the project team demonstrates the Model Office configuration they have developed to a broader user review committee (including executive decision-makers).

Facilitation

It may be advantageous to hire an outside (objective) facilitator to help with business process analysis and redesign if people seem to be protecting the status quo. If you choose to use an outside facilitator, be sure to choose one whose expertise is business processes. This person should be able to make recommendations based on experience helping other companies implement customer facing processes.

Define Success

List all the things that would fit in the blank in this sentence: "I will know this implementation has been successful when_____." Be sure to include all the reasons you chose the system in the first place. Make sure that some of these metrics are objectively measurable. If you want to increase customer satisfaction—name a specific numeric goal based on some method you define for measuring customer satisfaction.

Now put the list in a highly visible spot and measure all decisions against the list. It is important for you to document the goals you intend to reach through the implementation of the product and then later document when you have achieved those goals.

Phased Approach

Work towards the long-term enterprise rollout through a series of smaller, phased implementations, either by functional business unit or by feature set or both. Typical phases are the rollout of Customer Support followed by locally connected Sales or a particular sales group, followed lastly by remote users. There are numerous other variations but each has in common that they are small enough to be handled by a small number of people.

Keep it Simple

Recognize that what you are embarking on is the intertwining of a computer application with your business processes. This can easily become a hopelessly complex task. Start with basic, core features and add to this base as part of the phased approach. For example, consider adding more complex features after the initial rollout. This approach will decrease the end-user's initial learning curve and therefore ease their resistance to change.
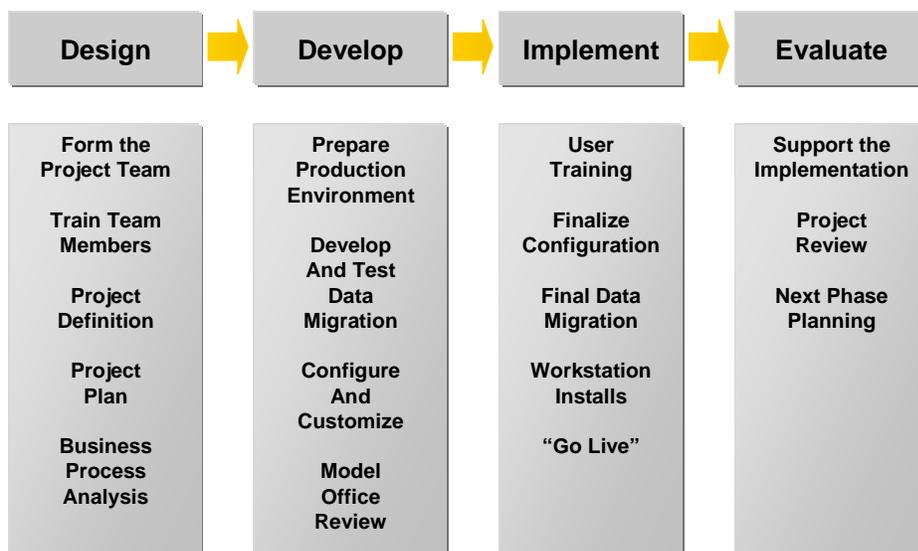
Train, Train, Train

Every one of the people involved with this project will need to be trained. Ensure that the project team is trained before they begin making decisions about the implementation. Ensure the CRM administrator is trained before beginning administration of the database. User acceptance and efficiency is greatly enhanced by training. Training needs to focus not only on how the product operates, but how you want company specific tasks (i.e. processes) to be performed using the software.

Many companies get to the end of a CRM implementation project just a bit over budget—so they cut the last thing they planned—training. This is a very big mistake that can significantly reduce the benefits the system was designed to produce.

Sample Implementation Path

The implementation path is the broad overview of how the implementation should progress. The details of each step in the path are to be found in the next section. The diagram below offers a simple view of the progress through an implementation.

Design	Develop	Implement	Evaluate
Form the Project Team	Prepare Production Environment	User Training	Support the Implementation
Train Team Members	Develop And Test Data Migration	Finalize Configuration	Project Review
Project Definition	Configure And Customize	Final Data Migration	Next Phase Planning
Project Plan	Model Office Review	Workstation Installs	
Business Process Analysis		"Go Live"	

Design

It is important for you to realize that what you are embarking on is a project. You have made a decision to automate portions of your business with CRM software. This is a serious undertaking that will require planning and decision-making. Therefore, you must assemble a project team.

Form the Project Team

A key member of this team is the Project Manager. Though you may choose to employ a third party consulting firm or the software vendor to assist with your implementation, there must still be a Project Manager from your company designated as the leader of the implementation effort. This person should be in a position in the company that will enable him or her to assemble the internal resources necessary to complete the project.

Project management experience is a plus as is experience with the primary areas where the software is to be used. The success of the implementation will have little to do with the technical elements and a great deal to do with business processes as they are implemented with the software. Therefore, a project manager with expertise in that area is a plus.

The project team should also contain representatives from the areas using the software. They will need to speak for their groups needs and champion the product to their group.

Finally, you should include the designated CRM software administrator.

The Project team will be involved in designing how users will conduct their work on the system. This may dictate changes in procedures or changes in the software or both. Finally, the team will participate in the Model Office Review to validate that all is in order for rollout.

Train the Project Team

Project team members must have knowledge in two specific areas in order to make good decisions about the implementation. They must have knowledge of their areas business processes, specifically those processes either being performed in or interfacing with the CRM system. Secondly, they must have knowledge of the CRM system.

Frequently, customers elect to utilize consulting services from the CRM solution provider for on-site project team training in conjunction with implementation planning sessions. Without a strong background in the product it is difficult to make decisions regarding its implementation.

Train the Administrator

As you prepare for the planning session it is advisable to designate your future CRM administrator and send them to administrator training for the selected solution. Having one or more qualified administrators on staff is key to your long-term success with the project. Think of your CRM administrator as a database administrator. They should understand relational databases, the CRM database structure and how your organization will make use of the software.

The CRM administrator should be familiar with the server operating system. Additionally the administrator should have database administrator training in order to accomplish the following tasks as necessary:

- Design and implement a database backup plan
- Restore the database as necessary
- Modify the structure of a database table
- Add and update database indexes
- Modify operating system and database security

Finally, it is useful for the administrator to have a strong working knowledge of the reporting system to develop reports and the required database queries.

Project Definition

It is advisable that you involve a consultant who is trained on your particular CRM solution in your implementation planning session to ensure that the project is laid out effectively. The purpose of the planning session is to develop a project definition and project plan. The project definition is the scope of the project and the plan contains the implementation tasks to perform, who will perform them and when.

Obviously you cannot achieve your objectives without first defining them. Here are a few questions your project team should answer before moving forward.

What group or groups will benefit from this software?

You have chosen to purchase a CRM package, but do you know why? Can you define who will benefit from the package? If the answer is your customers, then you should define what benefits you feel they should receive. If it is your sales staff, then be prepared to tell them what they are going to get out of using the software. For whatever group or groups receive benefits from CRM, you should be able to state what the benefits are and be able to support them through the implementation.

How will you know when you have a successful implementation?

As simple as this sounds, it is often difficult to document. Very simply, complete this sentence: We will know we have a successful implementation when _____. This is not a single sentence with one definition of success. Success will be determined by multiple components. Make sure that some of these statements be objectively measurable.

What are your short term objectives

Epicor always recommends that CRM products be implemented in phases. Choose the first business process to be automated in the CRM system. In most CRM implementations this involves implementing the Customer Support function in a LAN environment.

What are your long-term objectives?

List one or more long-term objectives in the order you wish to accomplish them. These will be the later stages of the implementation.

What risks and constraints are you facing?

You should list those items that constitute a risk to the success of the operation and additionally identify actions that can be taken to minimize the risk. Also list the constraints that may guide your decision-making. Typical constraints include the expected go-live date, the project budget and the availability of resources.

Be aware of the "triple constraint" that exists in almost every project. The "triple constraint" consists of Time – Resources – Capability. The reason it is defined as a triple constraint is that in any project all three of these cannot be fixed. If one changes—the others will most likely change also. If you set the end date and the capability (features) in stone—then resources will need to be flexible to deal with unexpected delays or complexity. If the resources and end date are fixed—then the capability will need to be flexible (changed).

What is the scope of the project?

Defining the scope of the project at the highest level means listing those major tasks that will need to be performed during the implementation. Below is a list of possible items:

- Install Model Office
- Install and configure CRM software
- Customize CRM software
- Import data from legacy applications
- Build production environment
- Train end-users
- Design and build interface to other applications
- Design and build custom reports

Project Plan

Once you have determined the goals and scope of your CRM project, you are ready to build the Project Plan. The plan reiterates the goals and scope and then defines how implementation will occur. The plan should include a schedule. Make sure you include the trained consultant in preparing a schedule. The consultant will have insight into how long certain tasks should take and will be aware of potential road blocks to a smooth implementation.

One recommendation worth repeating: plan to roll-out the CRM project in phases. The consultant will be able to help you determine what to include in each phase. It is strongly recommended that you not attempt to roll out CRM to all types of user at the same time. Small victories can enhance uptake of the CRM software and should be planned throughout the implementation cycle.

Business Process Analysis

One of the most critical factors of the success of your implementation is examining those business processes that are to be automated with the CRM system.

Review Current Processes

If you have never documented your business processes before, you need not be intimidated by the prospect of doing so now. It may seem tedious, but hours spent in this type of analysis can prevent days or weeks of chaos and delays later in the implementation.

Our recommended approach is fairly simple. First, list the major user groups that will be making use of the software. Then, for each major group list those uses they will be making of the product. "Uses" refers to distinct activities with beginning, middle and end. Note what information must be available to move from one step to another. Examples of business processes:

- Returning a product for refund

- Transferring product registration from one user to another

- Handling a customer inquiry concerning a shipping date

- Handling an e-mail blast to customers owning a specific product

- Notifying users of a particular product of patch or fix

- Qualifying a lead and creating a sales opportunity

Map Current Processes to CRM System

Your analysis will become even more granular when you test the CRM system against each of your procedures to determine how it will be used. When you get to that level of detail, it may be more productive to work on specific tasks offline then discuss your results as a team. Note that individual team members will need more in-depth training that they've received so far. It works well for the CRM administrator to schedule some one-on-one coaching to help team members get started.

Define some sample business processes and then document the best navigation path to efficiently use the CRM system to accomplish each process. Note any areas where there is not a "fit" or where you're unsure how to use the CRM system.

Identify and Resolve Gaps

Once your team members have tested business processes against the CRM system, they may have identified areas where there is not a good "fit." Individual team members from each functional area should develop their own list of observances and issues. Schedule a team meeting where everyone comes prepared with his their list. Now you can discuss whether you are going to change the process to fit the CRM system or change the CRM system to fit the process. Where you determine you will change the CRM system, you need to add that item to the list of requirements for customization.

Document Business Processes

The business process documentation has been evolving from the initial planning session throughout business process review and design. Finalize the documentation now so that it can form the basis of the upcoming Model Office Review. This documentation will form the basis for your user training materials, and where there were customizations identified as part of the gap analysis, it will form the basis for the customization requirements document.

Define your reporting needs

CRM systems will include numerous sample reports for managing your business. You should make a list of the critical reports that you need to run your business. Next, examine the reports that are already available in the CRM system and see if any are an exact or near match. For new reports examine whether the data necessary for the report is already in the database or whether additional data needs to be input in order for the data to appear in reports.

Develop

Prepare Production Environment

Hardware and Software

As part of your preparation, check your hardware against the system requirements specifications of your chosen CRM solution. Make sure in advance that you have the appropriate hardware and required software. You don't want to start your implementation with the discovery that you don't have enough client licenses for your database system.

Network Configurations

As part of your overall strategy for implementing the software, you need to examine how various groups are going to connect to the database. Four typical ways are listed below. These methods for accessing the application will have implications for your network and how it is configured.

1. Networked Users

Some number of your users will be on your internal local area network (LAN). These users will have the fastest connections to the application server and/or database server. Since you already have a network, its security will apply. Implementing these users does not have a lot of impact on your network configuration.

2. Remote Users

Remote users are those who will be accessing the application, but not on the LAN. There are a variety of access methods for remote users. You may have them connect to the LAN by dialing into a remote access server and connecting directly. While this was once popular, it has been mostly replaced by the next option.

You may have them connect to the LAN via a secure Internet connection or Virtual Private Network (VPN). In both of these cases the user sees the LAN as though connected locally. You need special hardware to support these both remote connections (modems or VPN equipment).

The last way to support a remote user is via the public Internet. This method has the most implications for how your network is configured, particularly related to web access and security. Remember that your remote users may not be employees if your CRM implementation includes access for partners.

Your chosen CRM implementation may provide Internet access through a couple methods. First, it may be browser-based. This means that all user access happens through a browser. This is the most common method and is often the approach used for software as a service (SaaS) deployments as well. The second method uses a rich client or "smart" client which talks to Web services on a Web server. Both methods require particular Internet configuration involving firewalls and usually—a "De-militarized Zone" or DMZ. Make sure you know how this will work and be prepared for the network changes.

Because your model office pilots are often conducted internally by networked users, you may not support mobile users until the final roll-out. Make sure you plan ahead and do some testing of remote access by end users.

3. Disconnected Users

One of the user types you will need to decide whether or not to support is disconnected users. These users do not have access to the LAN or a remote connection. There is a lot of variety in the ways CRM vendors support disconnected users. Make sure you test this access method as it can greatly affect your implementation.

4. Office Productivity Users

The newest category of user access is that of the Information Worker, users who don't typically connect directly to your CRM implementation but need to answer questions and make decisions based on the information it holds. These users typically access information directly through office productivity tools like Microsoft® Office® Outlook®, Word or Excel®. Essentially, by seamless connecting to underlying enterprise applications, these office business applications (OBA) provide contextual access to a broader community of users than ever before. This access method will almost certainly have an overhead as well, not as much as a networked or remote user, but will require factoring in nonetheless.

Develop and Test Data Migration

Very few installations will begin use of a CRM system without some data import. Consultants from your selected CRM vendor can assist with this data import and sometimes product training includes information on data import.

Whatever your legacy system, there is likely to be somewhere between a little and a lot of garbage data. Information coming from accounting systems is likely to be the cleanest. Information coming from personal or homegrown databases is likely to be the worst.

Scrub the Data

Before anyone imports the data into the CRM system, the data should be thoroughly scrubbed. In other words you should search for and correct any inconsistent or erroneous data. Examples of what you might find:

- Typos in key data

- Date fields that contain non date data

- Numeric fields that contain non-numeric data

- Numeric fields that contain out of range data (data that is greater than or less than what would commonly expect to find)

- Key data fields that contain no data or insufficient data to be useful

- Out of date data (e.g., wrong company name, address, phone, area code, zip code, etc.)

Perform these checks on a sample of your data to assess the overall quality. If you are showing error rates of greater than 25% then you have identified a problem area that will need to be addressed separately from the import itself.

Optionally: Scrap the Data

In instances where the database is small and the level of garbage data is high, it may be wise to start over with only known good data.

Importing

If you have a competent database administrator with a background in relational databases and a thorough understanding of the CRM database structure, he or she can perform the data import for you. Many CRM tools provide a tool for building data imports, but strong tools are also available with most database systems.

Consider Duplicates

In instances where data is coming from multiple sources you must make decisions about what constitutes duplicate data. Once you have identified likely duplicates you need to decide which of the duplicate records is most likely the accurate record.

Configure and Customize

Chances are that you will not be using your CRM system straight "out-of-the-box." Because of that you will need to discuss about changes. Changes generally fit in two broad categories—configuration and customization.

Configuration

Configuration items are those that are handled by settings within the CRM system. Examples of this would be setting up users and security, identifying system defaults, and changing configurable business rules. Every CRM system will require some configuration. If you want to pursue these tasks without assistance, administration manuals and training should prepare your CRM administrator for configuration tasks.

Don't forget that configuration includes security settings. Be sure to do some security configuration during this phase to make sure everyone can use the system appropriately when you go into production.

When it is recognized that there are a small number of clear alternatives in applying business rules, many CRM Vendors will implement them using configurable options that determine which rule to follow. These options allow vendors to provide alternative business rules without forcing you to write custom code. Most options will use a default value for the configuration. It is important that the CRM administrator understand the various options and how they affect the operation of the CRM application.

Customization

Customizations are activities that require you to write or change code. In some cases you will be modifying existing code or you maybe adding new controls, forms or functions to the product. Your consultant can provide you assistance in any of these areas.

Some CRM solutions take an extra step by allowing you to build new functionality within the system. This can be particularly useful since it is unusual that a CRM system will meet 100 percent of your requirements. Solutions that allow creation of new functionality within the system provide a framework that ensures the new functionality is integrated into the existing CRM functionality.

This is the area where a great deal of money can be spent. If you implement a CRM solution without customizations, the cost to implement can be quite low. However, this is also where you can create CRM capabilities that will provide your company with strategic value and advantage. Customizations should be carefully planned to get the most value with a reasonable investment.

Model Office Review

The Model Office Review is a major project milestone. Hold the Model Office Review after the project team has completed the system configuration and documented the business processes. If your project includes customization, then the Model Office Review should occur after the development work has been completed and tested by the team.

Purpose

The purpose of the Model Office Review is to walk through the system configuration with an extended Review team to validate the team's work and get approval to proceed with rollout. However, this should not be the first time stakeholders have been consulted about the system. Throughout the business process design phase the project team members should be in close communication with representative users in their respective functional areas. The Model Office Review is an opportunity to get the stakeholders together in one room and get buy-in and sign-off on the system. Approach it with the assumption that your configuration work is done, but be prepared for some rework based on feedback from external parties. It's much better to catch something that the team overlooked now than in the midst of the rollout!

Procedure

Use the use cases and function list you developed in the business process analysis phase to provide the agenda for the model office review. Provide users with the documented processes they are to accomplish and ask them to do it using the CRM application. Watch how they navigate the system and note where it is particularly difficult to move from one step in the process to the next. Those are areas that may warrant customization or additional documentation.

You should be making sure that all user groups can satisfactorily execute their tasks on the system. Record the findings from the model office review and determine your recommendations for changes to the CRM system or to your processes. Then estimate the amount of time and effort it will take to make each recommended change. The project team will then need to prioritize the list. The expectation is that you'll have more recommendations than time and resources. The triple constraint applies here and you will probably defer some of your recommendations to a later phase of implementation.

You will then make the changes agreed upon by the project team. After completion of the changes you may want to run the model office review again. This will ensure that the changes made achieve the desired results. Your test users will appreciate seeing improvements in the application and process and can become champions for using the software later.

Make sure you allocate time in your project plan for making changes based on the model office review. Skipping this step and not allowing users to provide feedback will greatly reduce the acceptance of the software.

Finalize Business Process Documentation

Based on the feedback received during the Model Office Review, revise and finalize the business process documentation. It's a good idea to circulate it to department heads and key executives for signatures. You are going to need their support while end-users adjust to the new system. Remember, change is hard and you can expect at least some resistance from end-users.

Implement

User Training

As mentioned earlier, training is one of the keys to implementation success. But often it is an afterthought and some look at implementation success as being achieved when the software is installed.

Do not assume that what appears to be intuitive to you will be so from the user's perspective. Be especially careful when dealing with groups who have never used an automated product or with groups who have become accustomed to other applications that are less full-featured than your new CRM product. A good rule of thumb is to train as though your business depended on it; it does. Given that level of seriousness, here are offer some general rules to guide your training success.

Train to your processes

A popular concept in the computing world currently is "use cases." At their simplest, use cases are merely the documenting of how systems will be used. Earlier in the Implementation you were asked to define your business processes, these are the use cases of your business. Use this same list to derive your training objectives.

For example, one use case might be a customer call to return merchandise and cross ship a replacement. In this case you would work through the steps in the CRM system and ensure that students saw a demonstration of this in instruction and later had an opportunity to practice this on the software. Some other examples of use cases are:

- Customer calls requesting additional documentation
- Sales request for system requirements
- A support issue emerges in a sales call to a current customer
- A customer calls to request an invoice to extend their service agreement
- A customer calls and indicates they have merged with another company
- A prospect calls your general number to ask for information about your product
- You receive a stack of business cards from a tradeshow
- A customer is dissatisfied with your response to a support call and asks to have the call escalated

The mission of the training is to provide a preferred means for your company to accomplish these tasks in the software.

Put your team through rehearsals

Much like performers in a play, rehearse your team's performance with the software before it "opens" in your business. In other words, any training that you do should have practice that mimics planned use of the product. Such rehearsal will invariably uncover areas that need clarification or additional documentation and procedures. Once your team has practiced their jobs on the software in the more forgiving atmosphere of the classroom they will be ready for their real performance on the job.

Take the time to do it right

The biggest excuse we hear when it comes to training is that no one has time. Sales people are too busy chasing leads, support people are too busy taking calls, and marketing people are too busy creating and executing programs. Without appropriate training you jeopardize the whole implementation effort. Failure in the area of training will often put you into a situation from which you will be unable to recover. A few hours of time devoted to training prior to implementation will save hundreds of times its value in lost time later.

Keep training

In the days, months, weeks and years following implementation your staff will change, but your need for training will not. Ensure that your training for new employees or those new to the tasks are as vigorous as the training you offered at the beginning.

Who will do the training?

An obvious question is, "who is going to do this training." There are several possible answers. First, you must realize that at least part of the training development will be your responsibility as you understand what you are trying to accomplish with the implementation of the software and you understand the processes of your company in conducting its business.

You can contract with the CRM vendor to have a professional trainer come on site to conduct training. Keep in mind that the professional trainer will still need to know enough about your business to mold the training to your needs.

A third option is to work jointly with the software vendor to present the training. Your trainer can address those issues and processes that are company specific and the software vendor trainer can address the general and technical issues.

Who needs to be trained?

The answer is: everyone who will use the software, although not everyone needs the same training.

If you are implementing complete full CRM package, end-user training should be subdivided based on user type. Users who will interact with certain parts of the system can be trained together. Users should be trained on the processes and features that help them accomplish their job function.

Keep in mind that your CRM system is a powerful tool that has all the facility to take your business to new levels of efficiency, but only if people know how to use it.

Finalize Configuration

This step really has two parts – finalizing the network configuration and setup and finalizing the application configuration.

Finalize Network Configuration

At this point, finalizing the network configuration should be a "no-brainer" because you already tested it during the previous phase. You are now making your changes permanent and published to all users. Now is when you install the application to the deployment server(s). If servers were previously placed in a special domain – they now need to be moved to the chosen domain.

Finalize Application Configuration

During the Model Office phase you may have tried multiple configurations of the CRM application. Having tested various options and made decisions to determine various configuration settings, you are now ready to apply those to the deployment installation.

This is also the time to setup all the users of the application and configure application security for them. You should have planned and tested security during the Develop phase.

Final Data Migration

At this point, you should have migrated your data several times while in the Develop phase. All that practice has been to ensure that the cutover to the CRM solution as the production system be as smooth as possible.

Workstation Installs

In parallel to the final data migration you should do the end-user workstation installs—if this applies. For browser-based applications this step may just be sending out an e-mail address with the URL of the CRM application in it. In the case of rich client CRM applications you can usually copy the contents of the distribution CD to a network drive and install the workstations from the network. This will be faster than carrying around CD's as you can do multiple installations in parallel.

A few rich client CRM applications create a Web site during the server installation that provides Web pages for accessing client installation programs. The CRM administrator can send out a URL for the installation page and allow end-users to run the install or IT staff can walk around and run the installation from the shared Web site.

"Go Live" on Production System

The final step is to "go live" or "cut-over" into production with the new CRM system. This may involve having users stop using legacy applications that are replaced by your CRM system. Companies often keep legacy applications running after introducing a replacement system, but if the old system is still available many users will not switch until forced to. Understand why training before going live is so important?

It is recommended that most users be "disconnected" from the legacy system at the point you go live. This has some risks, but if you have followed the guidelines in this document you will have mitigated most of the risk.

Evaluate

Support the Implementation

As your employees begin to use the CRM system—even after having been thoroughly trained—they will have questions. Be prepared to answer them. Your IT Help Desk staff should know how to answer basic questions about the CRM system.

Make sure your CRM administrator has time to answer questions as well. This will be a busy time for them, so it is important to consider the end-users as "customers" of the administrator.

Resist the temptation to take in a bunch of "enhancement" requests in the first week or two of implementation. Often, users will ask for changes to the new system to make it look/feel/act like the legacy system you just replaced. Let your "customers" become familiar with the system and acclimate before taking enhancement requests.

Project Review

It important to do an end of project review to review lessons learned, reinforce good processes, and stop doing things that don't work. This is often called a "post-mortem" meeting—or if you feel like the project isn't "deceased" but has in fact just been born a "post-partum" meeting. Whatever you choose to call it, this meeting should acknowledge that you are not done with the CRM implementation—that over time you will continue to change and mold the CRM system to meet your business needs.

Next Phase Planning

After the "post-mortem" meeting has occurred it is time to start planning the next phase. It is likely that you did not make every change recommended during the Model Office implementation and some of those suggestions were quite good. It is time to start thinking about additional changes to the system—particularly changes that can provide your company with a competitive advantage.

It is important that you have a strong change management process in place for on-going requests. The process you used in the Model Office should continue to be used on new suggestions. You should be working to ensure that changes to benefit one set of users do not cause problems for another set of users.

Remember that CRM is primarily about people and processes, not technology. While you now have the technology in place to improve customer satisfaction and loyalty, reach more prospects and increase revenue—the people and the processes will likely continue to change over time. The truth is that you are never really "done" with CRM.

Conclusion

Thank you for taking time to read this paper. We hope it will enable you to successfully undertake a CRM project that will transform your company and its relationships with customers.

The recommendations and methodology in this paper have been proven with hundreds of Epicor customers who have implemented our CRM solutions—both using Epicor Professional Services and going it alone. The combined experience of our customers has paved the way for you to increase the odds of CRM implementation success.

Epicor Software is a trusted provider of customer relationship management software for the small and medium enterprise market. With more than 20 years experience and over 20,000 customers, we supply everything you need for a successful implementation: quality products, experienced professional services, and excellent customer support.

If you have any questions about CRM please contact us.

About Epicor

Epicor Software (NASDAQ: EPIC) is a global leader delivering business software solutions to the manufacturing, distribution, retail, hospitality and services industries. With 20,000 customers in more than 140 countries, Epicor provides integrated enterprise resource planning (ERP), customer relationship management (CRM), supply chain management (SCM) and enterprise retail software solutions that enable companies to drive increased efficiency and improve profitability, and also empower global enterprises to achieve even greater success.

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