The Catalyst CRM Methodology
An overview

Developed by

Published by

ECCS
The European CRM Portal
www.eccs.uk.com
The Catalyst Foundation

The Catalyst CRM Methodology has been developed jointly by CustomISe, MACS and SalesPathways, organisations specialising in assisting users to benefit from CRM technology. Together they have formed the Catalyst Foundation, to develop and promote good practise in implementing successful CRM projects. The Catalyst CRM Methodology is the product of their collaboration and is the core of the Foundation’s ongoing work. It is based on the extensive experience the members of the Catalyst Foundation have gained in implementing CRM systems. Notes on the individual developers can be found in Section Four.

Please note that the Catalyst CRM Methodology described here is subject to change as the development work progresses. For more information about Catalyst and contact details, go to http://www.crmmethodology.com/

The European Centre for Customer Strategies

The European Centre for Customer Strategies, the publishers of the Catalyst CRM Methodology Overview, is Europe's leading web-community for both practitioners and suppliers in the CRM marketplace. Founded in 1999 by Business Intelligence, ECCS has earned a reputation for the quality of its analysis, research and coverage of market developments, CRM strategy, implementation and best practice. Independent of all software companies and suppliers, ECCS is run by Business Intelligence, organisers of the UK's leading annual exhibition and conference, training courses and publishers of research-based reports on CRM.

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Training courses

If you want to develop a deeper understanding of the principles underlying the Catalyst CRM Methodology and its application to your organisation, the European Centre for Customer Strategies organises training courses run by the developers of Catalyst. For more information about either public or in-house training courses, contact David Harvey, Director of ECCS, on +44 (0) 208 879 3300 or by email: david.harvey@business-intelligence.co.uk.
Executive Summary

CRM projects are difficult to execute successfully. This is because of the wide range of factors influencing their success. Organisations tend to approach them as IT projects, neglecting the people and (business) process aspects. But without changing the way an organisation works, in respect of its customer-facing activities, the chances of success are limited. To make matters worse, CRM projects have to be set against a moving background of changes in technology, the organisation and its marketplace. This means they face conflicting demands to deliver short and long term benefits to the organisation. All of these factors mean that it can take a long time to make CRM work properly for an organisation.

This overview describes a methodology designed to help organisations overcome these problems and balance the competing requirements. The Catalyst CRM Methodology, as the name implies, acts as a catalyst for CRM projects enabling them to achieve their objectives more reliably and in less time. It allows organisations to benefit from the extensive experience of implementing CRM projects gained by Catalyst’s developers: CustomISE, MACS and SalesPathways.

Five main phases: making complexity manageable

The Catalyst CRM Methodology breaks down what otherwise would be a dauntingly complex task into manageable phases, steps and work components.

The five major phases are:

- **Discovery** - establishing the business goals for CRM
- **Orientation** - defining necessary system and organisational changes
- **Navigation** - managing system and vendor selection
- **Implementation** – planning and managing the CRM project
- **Post Implementation** - monitoring performance and continuous improvement

The five main phases enable companies to address all the major aspects of planning and implementation. Catalyst gives organisations control of the whole project life-cycle. It provides a framework for decision-making and helps managers work systematically through all the tasks involved in successful CRM projects. Finally, it helps the organisation to continuously improve and adapt its CRM capabilities to meet the changing needs of the business and its marketplace.

These phases are broken down further into sub-phases and steps covering the development of a business scope process model, requirements contracting, project management, project team, champion group, process model, communications plan, scope & specification, configuration,
import and integrate, testing, training, risk management and systems evolution and management. These can be sub-divided into key work components and outputs.

A framework for project management

Even with the Catalyst CRM Methodology it is impossible to describe one sequential track where you execute one task and then move straight onto the next and so on to the end of the project without a backward or sideways glance. At a detailed level the steps, tasks and data involved interact with each other. To create order out of what would otherwise threaten to be chaos, the Catalyst CRM Methodology uses a framework adapted from the Zachman Framework, a set of constructs for implementing IT related projects. This provides a way of describing all the levels of detail in a project and its activities and their relationships to each other. As the project progresses through to implementation, this capability becomes increasingly important since ‘the devil is in the detail.’

Facilitating the CRM team

Any CRM project is a team effort and the Catalyst CRM Methodology allows all of the members of the team (senior managers, business representatives, project managers, IT specialists, vendors, contractors, consultants) inside and outside the organisation to understand their roles and responsibilities and how they affect others.

The model can be used at the ‘big picture’ stage to provide an overview for senior management. It can also be used at the micro level to provide details of what actually needs to be done day-to-day in conjunction with any standard or in-house IT project implementation methodology such as SSADM or Prince II.
Capitalise on established expertise

Making CRM work may not be simple, but the Catalyst CRM Methodology can help an organisation to tame the complexity of any project. It provides a multilevel model of the activities required to implement CRM for the benefit of the business in the shortest possible time. Catalyst represents the combined expertise of a team of managers and consultants who have many years experience of planning and implementing CRM projects. The Catalyst methodology allows you to benefit from the lessons they have learnt from their successes and mistakes.
Introduction

The following sections describe why a CRM methodology is necessary and its benefits. You will also find a brief description of the Catalyst CRM Methodology, its underlying principles and its five major phases.

1. Why do CRM Projects Need a Methodology?

Most organisations acknowledge the need to become ever closer to their customers, provide higher levels of service and gain and retain a higher share of business with the most valuable customers. The market for CRM technology has grown rapidly as organisations scramble to outperform the competition in developing superior customer relationships.

This technology has created severe challenges for businesses. Many projects never fulfil the implementers’ expectations and the financial return to the business is difficult to determine. There are several reasons for this but the principle issue relates to the complex environment affecting the successful implementation of a CRM project. This makes it difficult to translate business requirements into working practice.

“If, a decade ago, we had had a greater understanding of the business and organizational dynamics of the technology, I think we would now have an even greater payback from our investment in it. In my experience, the new systems that work best are those that are aligned not only with the business but also with the way people think and work.” Bob L. Martin, CEO of Wal-Mart Stores, 1997.

At the heart of the issue is the requirement to match technology with the way the organisation needs to work to be successful. This demands that a business resists the temptation to align technology with current working practices. The goal should be to improve ways of working to increase the competitiveness of the organisation. Otherwise there is a high risk that the investment will be wasted.

\[ NT + OO = EOO \]

\textit{New technology + old organisation = Expensive old organisation}

A CRM project is about far more than technology. It must enable organisations to successfully migrate employees, customers and partners (people) to improved business processes (see figure 1 below).
The success of a CRM project is a product of its three major elements: people, processes and technology as well as the existing environment within the organisation. This includes:

- The way it is organised and its culture – organisations with a functional silo approach and ongoing turf wars between sales, marketing and customer service will have more difficulty adapting to a customer relationship orientation and a ‘one-customer-view’ focus than one with strong cross-functional working.
- The business strategy and external environment – for instance a product-oriented strategy will be difficult to change. The organisation will be set up to measure success by product metrics such as product profitability rather than customer profitability. Data required to implement relationship management strategies will be lacking. Dynamic environments require systems that can keep up with the pace of change.
- Existing systems and procedures – existing technologies in use, communications networks, legacy systems and so on may constrain the technical choices available. The type, quantity and quality of data (especially
customer data) available influences the work needed to source the data that fuels a CRM system (see quote below). Similarly, existing ways of working provide constraints. Does the organisation rely on sales peoples’ personal ‘back-of-envelope’ customer profiles or formally documented, up-to-date and shared profiles?

“The first stage of a one-to-one initiative is simply identifying as many customers as possible. Until your business knows and remembers the identities of at least some proportion of your individual customers, launching any kind of program that depends on treating customers differently will be impossible.”
Peppers, Rogers & Dorf, The One-to-One Fieldbook, 1999

These issues are expanded in Figure 2.

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**CRM Drivers**

<table>
<thead>
<tr>
<th>Senior sponsorship</th>
<th>Broad product range</th>
<th>Few channels</th>
<th>High value customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer driven</td>
<td>Complex products</td>
<td>Information sharing</td>
<td>High acquisition costs</td>
</tr>
<tr>
<td>Cross functional team</td>
<td>Consultative services</td>
<td>Need for retention</td>
<td>Loyalty</td>
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<td>Pooled Budgets</td>
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<table>
<thead>
<tr>
<th>Organisation</th>
<th>Products</th>
<th>Channels</th>
<th>Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus on costs versus revenues</td>
<td>Commodity products</td>
<td>Complex channels</td>
<td>Low value customers</td>
</tr>
<tr>
<td>Turf battles</td>
<td>Little competition</td>
<td>Low information share</td>
<td>Price sensitivity</td>
</tr>
<tr>
<td>Product management</td>
<td>Complex channels</td>
<td>Incentives on acquisition</td>
<td>Infrequent purchases</td>
</tr>
<tr>
<td>Culture</td>
<td></td>
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</table>

**CRM Inhibitors**

<table>
<thead>
<tr>
<th>Gartner Group</th>
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<tbody>
<tr>
<td>Commodity products</td>
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<tr>
<td>Little competition</td>
</tr>
<tr>
<td>Complex products</td>
</tr>
<tr>
<td>Consultative services</td>
</tr>
<tr>
<td>Incentives on acquisition</td>
</tr>
<tr>
<td>High acquisition costs</td>
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</tbody>
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Adopting a customer-centric strategy means organisational and process change. This adds a “human dimension” to an otherwise “normal” I.T. project. In many cases, CRM implementations have been treated as if they were primarily technological in nature. This approach results in high failure numbers because CRM has other dimensions:

- CRM implementation demands process, organisational and cultural change (usually moving from product orientation to customer orientation).
• It demands that implementers are multi-skilled (many specialists are required for short periods of time rather than a few generalists), information based, non-hierarchical.
• The growing demand for multi-channel customer interfaces.
• The pace of technology developments in architecture, platforms and mobile communications is so great that every implementation needs updating three months after it has been completed.

Achieving major cultural change and adopting customer centric, multi-channel processes is difficult, costly, and time consuming. Transforming a business’s CRM capabilities completely can take as many as four years to achieve.

It is however fundamental to any business’s future ability to satisfy its customers. Combine this with most businesses’ need for immediate growth and you have conflicting objectives.

To satisfy both of these requirements at once, CRM implementations have to be driven by a long-term vision and strategy, but should be organised in bite-sized projects which deliver immediate benefits.

CustomISe, MACS and SalesPathways developed the Catalyst CRM Methodology to meet these competing demands on CRM projects. The aim is to improve the success rate of CRM projects by providing a way to link business strategy to CRM vision. It also links the technology project with improvements in business processes using a change programme that retains the support of the people affected, inside and outside of the organisation.

2. How the Catalyst CRM Methodology answers the needs of CRM programme managers

The major problem CRM programme managers face is reconciling the conflicting requirements previously described. In juggling all these issues they face the danger of failing to address one part of the programme adequately, or, even worse, not recognising the need for a particular element. Skills issues further complicate the problem. The relative immaturity of CRM means that there is a shortage of experience. Furthermore many aspects of implementation require specialist knowledge. Few organisations, let alone individuals, possess the full range of skills required.

Successful programme management for CRM therefore demands detailed attention to a large range of technical, organisational and motivational issues. Applying a methodology that leverages the experience of those who have implemented projects previously and breaks the problem down into manageable steps is one answer.

A life-cycle framework for CRM
The Catalyst CRM Methodology is being developed using expert knowledge of the entire CRM project lifecycle from concept to post implementation support encompassing the development of a business-based CRM strategy, technical implementation and the people and organisational issues. CRM programme managers can use it as a framework for their projects while still applying their existing implementation methodologies such as SSADM and Prince II for developing detailed system and data models.

The Catalyst CRM Methodology can be used as a safety net for CRM programmes. It can be used to integrate the relevant experts into the project as and when needed. It allows the link between business requirements, organisational change and the implemented system to be maintained thus increasing the chances of success.

3. The Catalyst CRM Methodology

3.1. General Description

The Catalyst CRM Methodology contains 5 main phases:

**Discovery** – once an organisation has recognised the need for CRM (or improving their existing CRM systems) the first phase covers the definition of the business environment and key factors inside and outside the organisation affecting the need for CRM. It is an audit of the internal and external environment of the organisation to identify the key issues that will impact a CRM programme. Its findings are the basis for determining the appropriate CRM vision and strategy for the organisation. What is the business strategy for the next few years? What is happening with customer satisfaction? How well are channels being managed and used? What is the competitive situation? How efficient is the sales force? How effective are the marketing programmes? What key business processes should be included? How should our organisation deal with customers in the future?

**Orientation** – having determined the CRM vision and strategy and the top-level requirements of the system, the Orientation phase provides the bridge to identifying the specific technical solution needed to meet them. This is done by working out how well existing customer facing business processes work and how they could be improved. This leads to a definition of top-level system requirements and essential organisational changes (roles and responsibilities).

**Navigation** – in this phase the system requirements are defined more precisely, the system is scoped, system and vendor assessment criteria are defined and a system is selected and contracted.

**Implementation** – with the vendor(s) and system requirements in place the main elements of technical and change management projects can be implemented. It is during this phase that
the system is built and put into use. Vital elements that must not be neglected here include data sourcing and management and on-going communication with the affected communities through training and other activities.

**Post Implementation** – in a sense, a CRM project never ends because CRM must constantly evolve to keep pace with the changing business and its environment. In trying to reconcile the short and long-term goals for CRM we advocate implementation in bite-sized chunks in line with an overall CRM vision and strategy. This means that the system needs to be maintained and developed to keep pace with emerging technologies and changes in the organisation but successive project(s) should incorporate the learning from previous corporate experience.

It is not always possible to take a direct path from start to finish with a CRM project. Steps are often iterative. Backtracking to address missed steps is sometimes needed to overcome project problems. Frequently senior managers decide they need to ‘do CRM’ and instruct project managers to install a system without sufficient thought or preparation. In these circumstances, the overall strategy and vision are lacking, senior management support is patchy and insufficient or inappropriate resources are allocated. Often the organisational change issues are just ignored. This is why so many CRM projects fall short of expectations or fail completely.
Although a company’s CRM project history cannot be re-written, applying the methodology to an existing project helps to identify the gaps that need to be filled and maximise the chance of reaching a successful conclusion.

**Organisational change and programme management**

Figure 3 also shows that organisational change and programme management actions are required throughout the project. This can be seen in more detail in figures 4 and 5, which break down the major stages into sub-phases (business scope, process model, requirements, contracting, implementation, training) and steps.
## Catalyst CRM Methodology Overview

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<thead>
<tr>
<th>Phase</th>
<th>Sub-Phases/Step</th>
<th>Sequence</th>
</tr>
</thead>
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<td>Scope &amp; Specification</td>
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<td></td>
<td>Systems Evolution and Management</td>
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</table>

### 3.2. Underpinning Concepts

There are two frameworks underpinning the Catalyst CRM Methodology. Figure 6 shows the relationship between the levels of detail of the project description moving down the diagram from the high-level business audit through to the technical detail in implementation before the cycle is potentially reinitiated in the post implementation phase. The columns across indicate different types of information and action needed during the project.

![Figure 2 The Underlying Catalyst Framework](image)
This framework is based on the Zachman framework (figure 7), a generic model of enterprise systems. It describes a system and its data through a hierarchy of descriptions with each row at a higher level of abstraction than the one below it. The Data, Function and Time (What, How and When) columns of the Zachman Framework have been combined in the Catalyst Framework to allow a more complete description of data in a CRM project. A column has been added for Organisational Interventions to allow for the greater influence of organisational issues on the success of a CRM project. In broad terms, the Scope row in the Zachman Framework equates to Business Audit, the Enterprise Model row to Process Model and the Systems Model row to Requirements and Contracting. A Post-Implementation row has been added to the Catalyst Framework to maintain the link between the overall strategy and individual CRM projects.

**Figure 3 The Zachman Framework**

The Implementation row in the Catalyst Framework contains parts of the Systems Model row in the Zachman Framework and also the Technology Model and Detailed Representations Rows.

When carrying out Implementation the more detailed levels of technical description in the Zachman Framework will be required. It is at this stage that a preferred implementation
methodology such as SSADM or Prince can be slotted into the framework to provide the system and data descriptions required.

The following sections provide more detail on each of the main phases of the Catalyst CRM Methodology.
3.3. Phase 1: Discovery

‘The Discovery phase lays the foundation for the whole programme, a necessary stock-taking before rushing headlong into designing (what, when and how?) and implementing (who & how?)’

Phase Summary

When organisations decide to implement a CRM system it is always in response to a need. Sometimes the need is explicit and prescriptive - “we need to respond to customer queries more quickly”. Most times it is more subtle and implicit - “we need to be more customer-value orientated to compete in this market”. Both needs are real. But as stated, they are not sufficient to select and implement a full-blown CRM system.

As the name suggests, the Discovery phase is about finding out. The need-to-know list includes:

- Finding out about the real needs that have to be satisfied by the implementation of a CRM system.
- Understanding the business and how it relates to customers.
- An audit of business circumstances, issues, the people involved, business capabilities and key business requirements.

The Discovery phase is intended to identify what the business wants from CRM– and most importantly where it is starting from now. As the earliest explorers found - it doesn’t matter how good a map you have to guide you - the easiest way to get lost is by failing to note where you are now.

Replacing assumptions with facts

Most businesses claim they know all this. The reality is that they have the capacity to know – but often they have not specifically asked the right questions. They need to reflect on the implications for their customer management strategy and practice, their ways of working, their organisation and their customer management systems. In this context the Discovery phase lays the foundation for the whole programme, a necessary stocktaking before rushing headlong into designing (what, when and how?) and implementing (who & how?).
Key Work Components Within The Discovery Phase

Organisational Interventions (Triggers & Guidance)
- Charter & Sponsor / Team Architecture

Events, Activities & Data (What, When & How?)
- Imperatives Events, Issues & Processes

Inventory & Network
- Markets, Channels, Customers & Products

Roles & Competences (Who)
- Roles, Responsibilities, Measures and Competences

Context & Motivation (Why?)
- Opportunities, Goals, Imperatives, Drivers & Strategies
### Phase Work Outputs

<table>
<thead>
<tr>
<th>Phase Component</th>
<th>Work Output</th>
</tr>
</thead>
</table>
| **Project Charter:**                     | - What the project will encompass, how it will be directed and managed, key milestones and responsibilities, critical dependencies and resource allocation.  
- How the project will relate to ongoing work and how it will be integrated back into the business before, during & after implementation |
| **CRM Vision & Strategy:**               | - What the envisioned CRM capability is, its value proposition and how it will differentiate the business.  
- How the business will knit together its capabilities to deliver a distinctive CRM offering  
- The choices the business is making to create a competitively sustainable platform |
| **Scale & complexity of requirement:**   | - What the CRM capability will encompass  
- How it will be integrated with other processes and systems within the business  
- What is in place now and what has to be built or created |
| **Business and Organisational Change Goals** | - What roles are involved and impacted  
- What new roles have to be created and which roles have to change / cease  
- What organisational form is appropriate to deliver the vision |
| **Context – key issues and commercial imperatives** | - The commercial reality the business is facing. What has to be addressed urgently. What is the value of CRM to the business  
- The sources of real competitive advantage. How sustainable value is created |
Phase Benefits

This phase is about visioning and strategy based on real insights and learning. It requires the business to make difficult choices and to decide on preferred courses of action. Whilst it need not take long it has to be undertaken by the right people in the business, and be carried out with commitment and dedication. Who are the right people? Done this way the benefits include:

- Understanding and agreement of the business context and benefits sought from adopting a CRM system
- Understanding what specific issues the CRM system will resolve
- Understanding what else is needed to ensure that the CRM system delivers the required CRM capability
- Identification of what the potential obstacles might be
- Confirmation of the actual scope of the implementation
- Understanding who and what in the business will be affected and how
- Confirmation of the value to the business
- Confirmation of the commitment required for the project to be successful
- Identification of sponsors and allocation of resources
- Confirmation of goals, milestones and broad timescales
- Development of a clear mandate to proceed
3.4. Phase 2: Orientation

‘An essential defining phase that creates a robust and agreed blueprint for the CRM capability demanded by the business’.

Phase Summary

Having decided the direction, goals and overall requirements of the CRM business project, the business has to survey and document in some detail the way it intends to carry out its CRM activities, noting any key changes that have to be taken into account. Typically these changes will reflect things that keep going wrong today - malfunctions - and new things that would radically change or incrementally improve the existing CRM capability - opportunities. This survey and documentation has to be presented in a way that allows detailed CRM business requirements to be detailed and specified (See next phase Navigation)

Documentation

The main task is to document what the business looks like now and what it is expected to look like as the CRM system is implemented. It is about documenting the “processes” that the CRM system will need to support, working out the involvement of different roles within the “processes”, identifying the “dependencies”, “events and results” and sorting out “sequences and scenarios” involved in the envisioned CRM capability. The Orientation phase creates a robust backbone of data, information and knowledge that becomes the unifying core for the rest of the project.

Although businesses have the capacity to do this work, they often lack the time or the tools / expertise to do it quickly and efficiently. They may also find that without effective facilitation, they get stuck or drawn into more parochial agendas and unhelpful turf battles. The Orientation phase helps them to create a robust and agreed blueprint for the CRM capability demanded by the business.
Key Work Components Within The Orientation Phase

**Process Model (Conceptual)**

- **Organisational Interventions (Triggers & Guidance)**
  - Discover & Design Teams

- **Events, Activities & Data (What, When & How?)**
  - Process AS / To Be, Inputs & Outputs / Constraints

- **Inventory & Network (Where?)**
  - Markets, Channels, Customers & Products

- **Roles & Competences (Who)**
  - Role to Process Matrix & Capabilities

- **Context & Motivation (Why?)**
  - Performance Standards & Success Criteria
# Catalyst CRM Methodology Overview

## Phase Work Outputs

<table>
<thead>
<tr>
<th>Phase Component</th>
<th>Work Output</th>
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</thead>
<tbody>
<tr>
<td><strong>Team &amp; Expert Inputs</strong></td>
<td>Key personnel to be charged with mapping and redesing the processes and provide feedback and guidance. Advocates and champions who are intimately involved with the project and ensure that it is integrated back into the organisation.</td>
</tr>
<tr>
<td><strong>Scope specific process validation:</strong></td>
<td>Validation of processes designed against possible country or product / channel specific validations. Required standards and capabilities to ensure completeness.</td>
</tr>
<tr>
<td><strong>Role / Responsibility Matrix</strong></td>
<td>What the roles in the processes are and their key activities and responsibilities. Where the process leadership is and what other process involvement is required. What the organisational implications of process changes are.</td>
</tr>
<tr>
<td><strong>Success Criteria</strong></td>
<td>What success will look like from different perspectives. How the achievement of the desired CRM capability will be measured. What standards are in place – how they relate to existing KPI’s.</td>
</tr>
</tbody>
</table>
Phase Benefits

This phase is about radical design and change as well as incremental improvement. It requires the business to approach the way it works with critical pragmatism and willingness to challenge existing practice. This means it benefits from balanced and intensive input from people across the business who understand the need for CRM, understand existing practice, warts and all, and are open to reasonable challenge. Done this way the benefits include:

- Understanding the nature of existing processes key issues, malfunctions and opportunities
- Understanding what has to be changed and the impact this will have locally and on related processes
- Identify s comprehensive change agenda including a detailed description by geography, markets, channels products and so on
- Understanding the roles involved within processes, the nature of their interactions and the way they will change in the future
- Describing specific key scenarios driven by the processes – highlighting the required outcomes and success criteria
- Deciding key elements of the project in more detail, identifying and assigning key milestone responsibilities and agreeing the sponsorship and project management approach and resources required
3.5. Phase 3: Navigation

“The art of the sailor is to leave nothing to chance.”

Annie Van der Wiele.

Phase Summary

The starting point & destination are known. The route map is prepared and organisational impact assessed. The business now needs to find suitable partners to deliver the appropriate technology.

The Navigation Phase is about properly expressing the business context and imperatives, the required process, functional, and technical requirements and resources to identify a suitable partner. All too often the task of defining requirements and partnering with a system vendor is carried out unscientifically leaving a gap between the objectives of the business and the deliverables from the vendor. Apocryphal stories of implementation failures and “the difficulty of CRM” often have their origins in the failure of businesses to properly express what they want adequately.

The CRM system vendor community is skilled in the business of developing CRM systems. They are not skilled in your business, your market or your organisation and the Navigation phase aims to provide clear and concise expression of the Discovery & Orientation phases. It also requires appropriate selection criteria to be defined to drive the contracting process.

In a market where some 200 vendors worldwide claim to provide CRM systems and where technology developments happen all too quickly it is essential to clearly communicate needs, understand options and carefully craft partnerships.

Key Work Components Within The Discovery Phase

Organisational Interventions (Triggers & Guidance)  
Events, Activities & Data (What, When & How?)  
Inventory & Network (Where?)  
Roles & Competences (Who)  
Context & Motivation (Why?)

Requirements (Specification)

Approach & Criteria  
Work Scenarios & Flows  
Supported Information Outputs and Inputs  
Roles & Deliverables  
Performance Standard & Success Criteria

Contracting (Procedural)

Qualification Process  
Qualifying Demonstration  
Evidence of support  
Skilling & Skill transfer  
Commercial viability & Goal alignment
## Phase Work Outputs

<table>
<thead>
<tr>
<th>Phase Component</th>
<th>Work Output</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall Approach &amp; Criteria</strong></td>
<td>➢ How the system requirement will be expressed and communicated  &lt;br&gt; ➢ What approach will be taken towards research &amp; short listing  &lt;br&gt; ➢ What assurances will be sought from the selected vendor  &lt;br&gt; ➢ What contractual criteria will be essential  &lt;br&gt; ➢ What is the change plan  &lt;br&gt; ➢ How the change will be integrated with system implementation  &lt;br&gt; ➢ Who will communicate the change plan and how</td>
</tr>
<tr>
<td><strong>Business Scenarios &amp; Flows:</strong></td>
<td>➢ What workflow support is required  &lt;br&gt; ➢ Development of business process scenarios for  &lt;br&gt;   o Vendor selection demonstrations  &lt;br&gt;   o User acceptance testing  &lt;br&gt;   o Training course development  &lt;br&gt; ➢ Definition of systems integration requirement &amp; supported dataflow  &lt;br&gt; ➢ Compilation of customer data with associated rules &amp; conventions</td>
</tr>
<tr>
<td><strong>Requirements Definition:</strong></td>
<td>➢ The business objectives  &lt;br&gt; ➢ The functional requirement  &lt;br&gt; ➢ The data requirement  &lt;br&gt; ➢ Access and security needs  &lt;br&gt; ➢ The overall system “look” and what evidence of experience need partners provide  &lt;br&gt; ➢ The infrastructure need to support the system  &lt;br&gt; ➢ The systems integration required</td>
</tr>
<tr>
<td>Phase Component</td>
<td>Work Output</td>
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<td>----------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td><strong>Organisational Interventions</strong></td>
<td><strong>Role Deliverables</strong></td>
</tr>
<tr>
<td>(Triggers &amp; Guidance)</td>
<td>• What project team skills are required for the implementation</td>
</tr>
<tr>
<td></td>
<td>• The skills and resource gaps and how will these be filled</td>
</tr>
<tr>
<td></td>
<td>• What skills transfer will be required to strengthen our resources</td>
</tr>
<tr>
<td></td>
<td>• What is the user training requirement – skills gaps and process training</td>
</tr>
<tr>
<td></td>
<td>• How will training be delivered and by who</td>
</tr>
<tr>
<td><strong>Context &amp; Motivation</strong></td>
<td><strong>Viability &amp; Alignment</strong></td>
</tr>
<tr>
<td>(Why?)</td>
<td>• Criteria for research &amp; vendor selection</td>
</tr>
<tr>
<td></td>
<td>• How project success criteria will be monitored and managed</td>
</tr>
<tr>
<td></td>
<td>• What measure will be used to assess commercial viability of the proposed solutions</td>
</tr>
<tr>
<td></td>
<td>• How the partnership will be developed and the goals aligned</td>
</tr>
</tbody>
</table>
Phase Benefits

This phase prepares the ground for an ongoing relationship with a technology provider. It determines how the system vendors will interpret your needs and how you will select a suitable partner for your CRM project.

There must be sufficient information for potential partners to properly understand your business and technical requirements to demonstrate effective solutions. The output from this phase must be clear and comprehensive to ensure there is a proper basis for evaluating and contracting with partners.

The benefits of this phase include:

- A blueprint for system requirements and a comprehensive starting point for the development of a system specification
- Creation of a reference point for all future change requests and project developments
- Development of criteria for system research, short listing & selection
- Confirmation of business, organisational and system relationships and objectives.
- System selection and pragmatic contracting process
3.6. Phase 4: Implementation

*It is not going to be easy;*
*It is not going to fast;*
*It is not going to be cheap.*
*But, also remember: It is not going to be an option!*

**Phase Summary**

There are many articles, papers and studies on the do’s and don’ts of implementing CRM systems. However, unless the project management and plan are scrupulously prepared and executed, the do’s and don’ts will be worthless. It is one thing to know in theory what to do but quite a different skill to make it actually happen.

It is important to understand that successful CRM project tasks contain no special magic– the components are just like those from many other IT projects. The magic is in how the plan is applied practically to take into account the unique aspects of a CRM project. The project plan is used to highlight potential pitfalls along the way.

If we regard projects as being made up of people, processes (including data) and technology, it is the people and the processes that cause the project to have unique twists. These factors can increase the failure risk for any otherwise good plan if the project manager is not aware of where, when and how to deal with these tricky issues.

This phase represents the project cycle as undertaken from the point of selecting and contracting with a technology vendor to the moment of delivering a first phase configuration to a designated group of system users (including customers, partners or internal user groups). It includes project management, process and system definition, data imports, integration, testing and training.

**Key work components within the Implementation phase**

- **Organisational Interventions** (Triggers & Guidance)
- **Events, Activities & Data** (What, When & How?)
- **Inventory & Network**
- **Roles & Competences** (Who)
- **Context & Motivation** (Why?)
- **Implementation** (Technical)
## Phase Work Outputs

<table>
<thead>
<tr>
<th>Phase Component</th>
<th>Work Output</th>
</tr>
</thead>
</table>
| **Project Team & Champions** | **Project Teams**  
- Steering committee  
- Project team  
- Champion team  
- Process leaders  
- Roles, responsibilities, reporting structures, ways of working |
| **Data and Specification Design** | **Technical and Data Specification**  
- Functional specification  
- Technical specification  
- Data migration specification  
- Data design |
| **Process Review**  
**Extended Project Scope**  
**Ongoing Analysis** | **Process Maps**  
- Process mapping  
- Process improvements  
- Project scope  
- Project measures, feedback, success criteria |
| **Training Programme** | **Training Programme**  
- Process data and scenarios  
- Training approach  
- Training data and materials  
- Process trainers |
| **Project Objectives** | **Project Key Indicators**  
- Long term vision  
- Short term project goals  
- Measures and feedback mechanisms  
- Milestones |
Phase Benefits

This phase is about translating radical business designs into systems specifications and implementation. It requires highly competent project management, strong sponsorship, a well-represented cross-functional project team prepared to invest time and effort. It also requires patience and clear communication of goals to the user community at large.

If the strategic and process foundations have been properly laid, the project has a solid foundation for delivering high business benefit. However, CRM projects in particular are fraught with cultural and user confidence issues. Of the three ingredients, people, process and technology, the people element is the most difficult to control and the most likely to jeopardise the project plan.

The key considerations within NAVIGATION are to ensure that a system represents best customer management and process practice, to ensure that the corresponding cultural change is well managed and that the senior and project steering committees support the process and system implementations.

The answer to these challenges is to use the process work as a springboard for the major project elements: system specification, system testing and system training. The benefits from adopting this approach are that the organisation:

- Delivers a system that underpins best practice processes
- Delivers a system that improves the customer’s experience
- Delivers system and information benefits to users
- Manages expectations for phase I delivery
- Communicates process and organisational change messages throughout
- Leaves the communication to a Steering committee with management and user representation
- Reduces the level of risk in early phases
3.7. Phase 5: Post Implementation

*CRM is a journey, not a destination*....

**Phase Summary**

To ensure that technology continues to deliver business benefit, a CRM project team needs to monitor system needs against design on a continuing basis. Once a phase of a CRM project is complete, the risk is that system usage decreases to the lowest level of user understanding, while the business needs grow as a result of market change and increased customer demand. It is also typical that the CRM project phases are limited to early wins and a level of pragmatic “what can we achieve”, leaving other functions, data or integration needs outstanding.

In addition, risk management in CRM projects is important to make sure the system is aligned to business needs and adheres to the most efficient and practical technology standards within a wider realm of other e-business systems.

The Post Implementation phase is primarily designed to limit the risk factors around the four critical success factors in CRM: processes, change, people and technology.

To manage these factors, this phase defines guidelines for an ongoing CRM system management team and their key roles to deal with ongoing process and technology change and scope for future projects.

**The need to keep abreast of change**

All aspects of companies’ processes undergo change. Financial, manufacturing, distribution and HR systems experience changes that are based on a framework of more easily defined processes. They are to some extent driven by legislations and changes in marketing and sales opportunities. They also respond to changes in available technology that allow processes to be streamlined and rationalised.

The changes that occur in customer facing systems, however, are forced by internal pressure to outperform the competition or marketplace pull to provide new or better products and/or services.

The rate of change in front-end marketing and sales requirements is exponential. With the globalisation of markets, organisations that strive for an international presence are
finding this a real challenge. With globalisation, the changes are not just restricted to national boundaries. The speed of change is exacerbated by rapidly changing marketplaces changing at different rates at different times across national borders.

The CRM Implementation methodology (current and future) must factor in adaptability. A project that for any reason takes longer that six months to implement in its first phase is in danger of stalling due to outdated processes, loss of interest and an ROI that is difficult to justify. Change management programmes must be in place and the methodology must fully accommodate this requirement. Management of subsequent change must be well focused and timely. It must also be aligned with the time frames dictated by the executive. It must not be the bottleneck in an implementation.

Political and cultural issues are the hot points to monitor. Remember to sell early and sell often, create benefits for everyone, and create a project team that can reach decisions by consensus providing that those decisions conform to the goals defined by the project board.

**Key work components within the Implementation phase**

<table>
<thead>
<tr>
<th>Organisational Interventions</th>
<th>Events, Activities &amp; Data</th>
<th>Inventory &amp; Network</th>
<th>Roles &amp; Competences</th>
<th>Context &amp; Motivation</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Triggers &amp; Guidance)</td>
<td>(What, When &amp; How?)</td>
<td>(Why?)</td>
<td>(Who)</td>
<td>(Why?)</td>
</tr>
<tr>
<td><img src="image1" alt="Environmental/Market Change" /></td>
<td><img src="image2" alt="Data Imports" /></td>
<td><img src="image3" alt="Process Review" /></td>
<td><img src="image4" alt="Ongoing Training" /></td>
<td><img src="image5" alt="Project Objectives" /></td>
</tr>
</tbody>
</table>

**Phase Work Outputs**

<table>
<thead>
<tr>
<th>Phase Component</th>
<th>Work Output</th>
</tr>
</thead>
</table>
| Mission statements, definition of strategic objectives  
- Has strategic direction changed? Has the market undergone significant change? Are there new competitive activities? Have margins or product positions changed? |
Phase Component | Work Output
---|---
**Import Specifications, Integration**
- Have any new information sources emerged?
- Is there a newly emerged integration requirement?
- Do additional phases require new integration to other systems?

**Process Alignment/Innovation**
- Ongoing process reviews need to take place to constantly ask, “How can we improve the way we work?”
- Technology innovations. Has technology significantly developed to enable new ways of working? What have other businesses pioneered? How can we use this to our customers’ benefit?

**Training and Communications Programme**
- System Administration Team. Roles and responsibilities.
- Champion Team. Roles, responsibilities, schedule, new innovations, testing etc

**Project Planning**
- Project Plan for ad-on phases. Project objectives, milestones, objectives, plan and resource.
- Project objectives are tied to business changes. If the context changes, new initiatives in the CRM project should deal with new opportunities or threats.
- Project Context changes drive new project goals and objectives.

**Phase Benefits**
- Reduces risk of system falling into disuse
- Reduces the growing gap between current and future process needs
- Keeps pace with the growth of system demands
- Keeps launching incremental projects to adapt technology to new business drivers
- Addresses cultural and communication issues with ongoing CRM communications plan and team
Catalyst CRM Methodology Overview

- Monitors system use and matches to process and business need. Develops user training and communication programmes to meet cultural, skills and political needs.
- Monitors technology standards, development and trends. Assesses the CRM project against other I.T. project criteria and integration standards. Uses a wider I.T. integration framework as a benchmark for CRM technology platforms and developments.
- Delivers highest, longest serving ROI on technology investment.
- Delivers highest level of e-business integration and user functionality because of the long-term nature of the project’s life.

4. Credentials

The Catalyst CRM Methodology represents the combined experience of a set of organisations and people with in-depth CRM expertise ranging from business, sales and marketing strategy, through organisational development and technical implementation. This is combined with extensive knowledge of CRM systems and vendors and practical experience of implementing successful systems.

We have brought these skills to bear on developing the Catalyst CRM Methodology through a partnership of three organisations: CustomISe, MACS and SalesPathways:

- CustomISe focuses on providing CRM knowledge, to users and vendors to allow them to implement CRM systems more successfully. This is done through in-company training and workshops, consultancy designed to transfer implementation skills to clients and practical research projects. CustomISe provides CRM training courses for Business Intelligence.
- MACS specialises in the implementation and project management of CRM systems.
- Sales Pathways is a specialist Consultancy dedicated to enabling client organisations to implement effective CRM and Service systems solutions that help them to achieve and maintain Sales & Service Leadership. Typically this involves helping them to renovate or completely recreate the way they interface and manage their customer relationships. In addition we work with senior management to develop organisational processes and capabilities that will enable the CRM solution to work effectively - even as sales channels converge, technology develops and customers’ needs change.

The expertise of each of the main individuals involved is described below.
Melanie Badenhorst - CustomISe

Melanie Badenhorst is a founding partner of CustomISe. She has 15 years experience in customer-facing technologies. As part of an MBO team in the late 80’s for an early front-office software business, she has gained considerable experience in development and implementation of customer-facing technologies. Since then Melanie co-founded a customer-focussed consultancy business in 1997, followed by two years as the Managing Director of a leading European Customer Relationship Management vendor. Most recently Melanie has founded aCRM consultancy and training business, CustomISe.

Melanie’s in depth experience in the Customer Relationship Management and e-business markets provides her with a wealth of knowledge of market landscape and industry issues. In addition, she has specific understanding and experience in business drivers and success factors of CRM and what makes this technology deliver a Return on Investment for the client.

Melanie Badenhorst graduated from University of Cape Town, South Africa, with a BA (Fine Art).

Janet Downes - CustomISe

Janet Downes is a founding partner of CustomISe. She is a marketing consultant and trainer specialising in marketing and business strategy, sales and marketing process assessment, product management and the application of IT to marketing. Her background is in the IT industry, first as an electronics engineer and later in sales, marketing and general management. She has been a senior international executive with Intel, Dupont and Fuji and with other organisations in the semiconductor, PC, computer services, CAD and printing and publishing industries. Janet’s client list contains many well known companies such as Alcatel, Arthur Andersen, AT&T, Axa, CompuServe, Compaq, Ford, Gartner, Hewlett Packard, Lucent, Marconi, MCI WorldCom, Norwich Union, Siemens, Tektronix and Thomas Cook as well as public bodies such as BSI and the Industrial Development Board and many SMEs (Small and Medium Sized Enterprises).

She is an expert on marketing planning and gives courses in this subject for the Chartered Institute of Marketing (CIM) and the Institute of Directors (IoD).
She has become increasingly involved in the application of IT to marketing and sales with the growth in the use of Customer Relationship Management (CRM) systems.

Janet is also a director of ACSL, a Web enterprise providing portals for users of computer expansion and peripheral products.

**Michael Juer - CustomISe**

Michael Juer is a founding partner of CustomISe and is a specialist in the application of technology to support sales and service transformation strategies. His recent career, spanning 15 years, was at Director and Board level in the Customer Relationship Management (CRM) software systems market. He was one of the early market pioneers in the mid ‘80s and then piloted a company from private UK start up in 1992 to acquisition by a publicly quoted global software house in 1997.

His experience of both business development, process design and implementation and technology in CRM make him a specialist in this market with a thorough understanding of the organisational impact and issues relating to the application of technology.

He was also a founder of SalesPathways Ltd, is a regular contributor to the CRM press, has an active conference speaking and chairing profile, lectures at university, and is chairman of the Customer Technology Association (CTA).

**Anthony Kasozi - SalesPathways**

Anthony Kasozi is a Director of SalesPathways Ltd. He has many years Sales, Marketing and Customer Service line management and consulting experience.

After working as a Brand Manager, New Brand Development Manager and National Account Manager with Unilever, Anthony has worked as a consultant with Deloitte, Haskins and Sells, Coopers and Lybrand, and Ashridge Consulting Ltd.

Major clients have included clients such as Aventis, Bass, Barclays, Courage, DuPont, Hewlett Packard, St Gobain, Levi Strauss, Heineken, Novartis, The Arts Council of Ireland and Unilever.

Anthony’s work with clients has covered a wide variety of areas: ranging from defining new, pioneering and value defining service and service/product offerings and reducing new customer churn to re-inventing tired corporate identities and establishing European wide marketing and sales organisations and processes.
Grant McAlpine - MACS

Grant McAlpine is the Principle Director and founder of MACS. He graduated from Massey University, New Zealand, with a B. Technology (Hons.) and has been involved in the Computer industry in the UK since 1981.

Grant was the founding director in 1984 of Workstations Ltd and was instrumental in the design, technical development and implementation, for Citibank, of one of the first Sales and Marketing software systems in Europe. He continued the development and implementation of Symmetry, the spin off product, until moving in 1995 to Matrix International (one of Europe’s leading Sales and Marketing System suppliers) as Technical Director. Matrix was subsequently sold to Aurum and Baan in 1997.

Grant joined Hewson Consulting in 1997 as Research Director and was responsible for the technical research of the leading Marketing, Sales and Customer Services systems. He also undertook the project management, for clients, of the implementation of these systems taking them from project launch, vendor selection and system acquisition through to system rollout. Grant left Hewson Consulting at the end of 1998.

Grant currently specialises in vendor selection, vendor analysis, vendor side and client side Project Management for the implementation of CRM Systems.

Catalyst website

For more information about the Catalyst Methodology, go to:

www.crmmethodology.com
5. Catalyst CRM Health check

This final section will help you assess your organisation’s readiness to undertake a CRM programme. It is based on some of the core concepts that underlie the Catalyst methodology. As well as indicating your company’s overall readiness for CRM, it is intended to focus attention on key strategic, process and implementation capabilities that must be in place for CRM to be undertaken successfully. Score the statements below to find out whether you’re ready for CRM and what key issues you should consider for a High Return/Low Risk CRM project. The Health Check is divided into three sections: Customer-Focussed Strategy; Customer Centric Processes; and Readiness for Software Implementation.

For each statement, score yourself as follows: Yes=5, Partially=3, No = 1.

The Health Check is based on the Catalyst Methodology which will be covered in more detail at ECCS 2001.

SECTION ONE

<table>
<thead>
<tr>
<th>4.1. Customer Focused Strategy</th>
<th>Score (Yes=5, Partially=3, No =1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our company has a clearly formulated customer management strategy that reflects our customers needs</td>
<td></td>
</tr>
<tr>
<td>We know how our customers rate us in relation to our competitors</td>
<td></td>
</tr>
<tr>
<td>We have identified our key strategic customer objectives for the next 3 years</td>
<td></td>
</tr>
<tr>
<td>We understand our customers’ business priorities, concerns and sales drivers</td>
<td></td>
</tr>
<tr>
<td>We know why customers choose us over the competition</td>
<td></td>
</tr>
<tr>
<td>We know which customers are delivering the most profit</td>
<td></td>
</tr>
<tr>
<td>We can measure customer satisfaction</td>
<td></td>
</tr>
<tr>
<td>We can predict our customers’ future needs and can change our business to meet them.</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
</tr>
</tbody>
</table>

Interpreting your results

25-35
You have passed the strategic planning phase and are ready to prepare for a CRM implementation project. You need to make sure that your strategy looks at your business from a customer’s perspective, and that you have senior sponsorship for the CRM project. The next
phase in your project should be to define the scope for the first project phase, which means understanding where you will gain early business benefit.

15-25
You have formulated some strategic and customer objectives, but they’re not clear enough for a CRM investment. Many companies are good at general strategy and competitive analysis, but are not very customer focussed. Try to understand your customer base: who they are, where they get their profits from, why they buy and what they may do in the future.

0-15
You are not in a position to embark on a CRM project and if you do the project will have a high risk of failure. Many projects are based on a quick win or tactical gains. The reality is that CRM strategy and technology is too difficult and too expensive to do it for these gains only, and a successful project needs to identify long term, strategic gains in order to deliver real business benefit. An added danger of inadequate strategic planning is that you do not have sufficient senior sponsorship or understanding. This will later create organisational change issues.
## SECTION TWO

### 4.2. Customer Centric Processes

<table>
<thead>
<tr>
<th>Score (Yes=5, Partially=3, No =1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>We work in a highly organised and carefully planned way</td>
</tr>
<tr>
<td>We have examined our processes (ways of working) for inefficiencies</td>
</tr>
<tr>
<td>We have considered our processes from our customers’ perspective</td>
</tr>
<tr>
<td>We have identified where technology can improve the way we work</td>
</tr>
<tr>
<td>We understand how process improvements relate to strategic objectives</td>
</tr>
<tr>
<td>We measure customer satisfaction</td>
</tr>
<tr>
<td>We know how to measure Return on Investment for I.T. projects</td>
</tr>
<tr>
<td>TOTAL</td>
</tr>
</tbody>
</table>

### Interpreting your results

**25-35**

Congratulations! Process definition and re-engineering is a critical part of CRM. A high proportion of CRM projects fail as a result of poor process definition or even not attending to process at all. If you have truly understood the way your company works, identified the malfunctions and re-engineered those to deliver a truly customer-focused business then you are in a position to make some important decisions. Process maps can help you define where the early CRM benefits lie to serve as the basis for CRM project scope. They serve as a foundation for an ROI, and should form an important part of the Requirements Definition that is issued to software vendors. Process should also be used as a basis for system specification and configuration, and should be used as a basis for user training.

**15-25**

You’ve understood that you cannot ignore how you work today, never mind how you’re going to work tomorrow, in the scope of a CRM project. You’re half way there! However, you need to pay greater attention to the details. You should seek to have an overview of all customer-centric processes. This means involving process owners from each functional area and looking at how they work. This should be analysed from the customer’s perspective and malfunctions should be identified. This gives you a blue print for improvement and for a return on investment case. Beware, however, it is notoriously difficult to map your own processes and even more difficult to admit to their shortcomings. Middle managers, who are
the ones who understand a lot about how you work, are also probably threatened by admitting the malfunctions. A senior project sponsor should communicate to the process teams that this is not to uncover inefficiencies, but to identify obvious improvements. This in turn helps focus the early stages of a CRM project. Process definition is also a critical part of software selection. If you don’t understand how you work it is possible to make a “features-led” software choice that does not ultimately deliver business benefit.

0-15
This low score shows that you have not as yet placed emphasis on process mapping and re-engineering. Whilst this is a scary part of the project and easily overlooked, it its critical to future success and driving down the risk of CRM. A common misconception in the CRM market is that software alone will deliver business growth. This is of course untrue. Software can only underpin a change in the way we work, in other words, you need to work out what changes you’re going to make and then select and configure software to support those. It is worth slowing down a CRM project that is in procurement stages and go back to the process definition stage. If you don’t, you’ll be unable to configure software accurately and the system is unlikely to deliver more than tactical benefit. A further important consideration factor is that of cultural change. Systems represent change and will not be well received without good benefit to both users and the organisation. Systems that do not follow clear process mapping tend to be difficult to use and cumbersome and therefore meet high levels of user resistance.
SECTION THREE

4.3. Readiness for software implementation

<table>
<thead>
<tr>
<th>Item</th>
<th>Score (Yes=5, Partially=3, No =1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>We have sufficient in house technical expertise and skill to select and implement a leading technology solution</td>
<td></td>
</tr>
<tr>
<td>We have a team that can integrate CRM with other applications (back office, ordering and invoicing and delivery etc)</td>
<td></td>
</tr>
<tr>
<td>We have a strong project manager who can manage system expectations and requests</td>
<td></td>
</tr>
<tr>
<td>We are experienced in software contracts negotiation</td>
<td></td>
</tr>
<tr>
<td>We have completed process maps as a basis for project scope and return on investment plans</td>
<td></td>
</tr>
<tr>
<td>We have based our CRM budget on realistic predictions including in-house resources required to manage and sponsor the project</td>
<td></td>
</tr>
<tr>
<td>We have communicated user benefits to the user groups involved</td>
<td></td>
</tr>
<tr>
<td>We have secured senior sponsorship from all functional areas</td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL**

Interpreting your results

25-35
You've done your homework and planning and are ready for the hard work; the actual implementation. Typical pitfalls in this phase are lack of project management and control, lack of senior sponsorship and lack of user buy-in. It is also possible to be led too much by the software vendor and forget about your original business objectives. Make sure you have a strong, commercially minded project manager in house who is able to escalate issues to the top where appropriate. Also make sure that good senior sponsors support your project.

15-25
You are part the way there to being able to support a customer-centric strategy with technology, but you are not in a position to embark upon an implementation without the right team and plan in place. Many businesses underestimate the amount of in-house resource required for this type of project. A good in-house team should consist of Project Sponsors,
Project Managers, functional representatives as well as marketing and technical support. Typical resource shortfalls are in the Project Management and process mapping areas. A lack of good technical resource will make the project more risky with respect to implementing the right infrastructure for future integrated systems. Another area often overlooked is that of data. You should assess the quality and quantity of data and think hard about how you’re going to use it in the project. Finally, make sure you have not skipped out on good process planning, as this will jeopardise the project in later stages.

0 – 15
Don’t do it! Don’t just implement technology for the sake of technology and efficiency gains. Tactical projects that are not well planned and not led by clear business drivers carry a high failure risk. It’s all too easy to get carried away with promises delivered by software developers and lose sight of your real business needs. It’s also typical that software vendors will underplay the implementation phase to the detriment of the project. Go back a few steps and plan both your business context and team before embarking on what could be a long, stressful and costly technology project.