
An Incremental CRM System Rollout Strategy: Phased Approach

Presented below is an outline of one option for implementing a CRM solution within a professional service organization. This solution is based upon the following basic assumptions and facts. Following this section is an overview of three different approaches to take when addressing the implementation and data migration strategy.

- The larger and more geographically widespread the organization, the more difficult the CRM implementation problem becomes.
- Professional service organizations have an acute need to maintain marketing and contact information, as well as to coordinate marketing activities.
- The path to success for CRM and marketing projects is driven by collecting and then publishing back to the users, information which they don't already have, or to which they don't have easy access.
- The desire by organizations to see incremental returns on investment in new technologies.

Taking an incremental approach to these projects is one method of proceeding. An understanding of the following items will help define the strategy:

- The nature of data within professional service organizations.
- The reaction of users to different 'user interfaces' and their impact on data access.
- Potential process changes and ongoing maintenance required to support the system.

The option outlined below provides immediate benefit to marketing initiatives, while at the same time builds the data infrastructure necessary (relationship tracking) for delivery of valuable information to the professionals.

The time frames are for discussion purposes only, and will vary depending upon the size of your organization, and the final scope of the project.

Phase I: Address Marketing Database Needs

Time: Immediate
Time to Complete: 4 – 6 weeks

Scope:

The initial phase will be to implement a solution which will address the core needs of Marketing in terms of maintaining and managing mailing lists. Data will be collected from all sources (information essential to Phase III of this project) and processes will be put in place for maintaining this data. This phase will be completed in the following steps:

- Initial product installation and customization to meet base marketing department functional requirements: 2 - 3 weeks
- Implementation of process and work-flow to support the marketing function: 1 week
- Identification, collection and cleanup of existing data: 1 - 6 weeks
- Training of practice group and Marketing Department participants: 1 week

Benefits:

- Marketing will be provided with a system designed to suit its basic business requirements.
- Data will be maintained at the practice group level, where contact information is more current, and relationship information can most easily be communicated.
- Does not require a huge change in existing processes (practice group level contact management, if it does not already exist, is the only required change).
- Marketing information will be provided back to the contributing practice group administrators (or professionals) via paper reports which will show a complete view of who knows the contact and which mailing lists the person is on.

Phase II: Integrate Marketing System with Other Existing Data, begin data consolidation and cleansing.

Time: 1 – 2 Months after Initial Installation
Time to Complete: 1 – 2 Months

Scope:

The second phase will be to integrate the information from other key sources (accounting, HR, selected other databases) with the marketing data to provide a more complete view of the people and companies the firm communicates with and to begin the data collection, deduplication and cleansing process. To achieve this, the following steps are required:

- Identification of data to be integrated with the marketing system: 2 weeks
- Define processes to 'harvest' and 'synchronize' these sources with the marketing system: 2 weeks
- Implementation of functionality: 2 – 4 weeks

- Identification and implementation of data maintenance routines: 1 weeks
- Identification and implementation of data mining reports: 1 - 3 weeks

Benefits:

- Integration of exiting data maintained in other systems (accounting, HR, etc.) will save substantial costs for re-keying and data maintenance.
- The inclusion of accounting data will allow marketing to do direct analyses based upon financial and practice area participation within the current client base.
- Marketing will be better able to respond to the traditional 'who knows whom' relationship information and 'experience and expertise' type information requests.
- The mixing of the external data with marketing data sets the stage for 'publishing' information directly back to the practice groups and professionals (Phase III).

Phase III: Direct User Access to Relationship Data

Time: TBD

Time to Complete: 3 - 6 Months; Ongoing

Scope:

In this phase, key client and relationship information will be published back to the users via the CRM system. The basic contact / mailing list information provided in Phase I will, by this time, have been enriched by the mere fact that it is stored centrally and contact 'sponsorship' information is tracked. The data will have been further enriched by the Phase II marrying with other internal (or potentially external) data sources, resulting in a much broader view of the contacts the firm deals with. To achieve this, the following must be accomplished:

- Identification of initial data to be 'published' to the users: 1 - 2 weeks
- Modification of existing design to meet publishing goals: 2 weeks
- Implementation of the user interface (integration into existing intranet): 2 - 6 weeks
- Rollout to users and training: TBD

Benefits:

- Direct user (professional) access to data, instead of through requests to practice group support and marketing staff.
- A single repository for business development and relationship information is delivered to the professional desktop proactively.
- Better client and relationship knowledge will increase client retention and the recognition of new business opportunities.
- For the above-mentioned reasons, data will be more current, and its value will be enhanced. This will create a propitious cycle of use – benefit – more use.
- Functional CRM is achieved.