Your CRM
IMPLEMENTATION

Things to consider before you get started

Taking the time to consider the following questions is extremely important and will help you better prepare for you CRM planning and implementation strategy. Studying and answering these questions now will get you heading in the right direction. If you are well on your way already, use this document as a checkpoint. If you have missed something, now is a good time to make a correction or two. We hope that you find this information valuable. If you have any further questions, give us a call!

- **Objective -** What are the objective(s) of the project?
- **Users -** Who will be using the system? What are their job roles, functions and responsibilities at your organization? How many users in each role will need access to the system?
- **Systems to be Replaced -** Are we replacing an existing system? If so what system and discuss if data will be migrated to salesforce.com.
- **Re-Deployments -** If this is a redeployment or you already have users set-up, then we will want to know what is working for the current users and what isn't.
- **Integration -** do you expect your new CRM to "connect" or integrate to any other software system? Examples include accounting and financial systems, human resource systems, data warehouses, etc.
- **Data -** do you have data to be loaded into the system (one-time initial data loads)? If so, what is the format of the data (e.g.,. excel) or where is it currently located? What type of data and how many files of each (e.g., lead lists, customer lists, pipeline deals, call logs, etc.).
- **Training -** Where are the people who will be using your new CRM located?
- **Internationalization -** will the deployment be entirely in US dollars and English, or do we need to support multi-currencies or other languages?
- **Reporting -** what types of reports, measurements or analytics are you expecting (high level discuss only during our scope call; we can drill into great detail during the discovery portion of the project).
- **Mobility -** do your users have iPhones, Blackberries, iPads or other mobile devices? If so, be prepared to discuss if you want users to have access to your CRM data from mobile devices and what type of devices they use.

- **Email -** what email client do you use? MS Outlook, Gmail, Mac Mail, other? If you are an Outlook user, know what version of MS Office (2003, 2007, 2010, etc.) and if you are backed by an Exchange server.

- **Campaign Management -** do you have at least one dedicated marketing person and will you need to track marketing efforts like trade shows, email blasts, mailings, webinars or other events? Do you do any level of mass-emailing? If so, what tool do you use and what are your expectations for what the CRM will handle in this regard?

- **Lead Management -** do you purchase lead lists, get lists from trade shows or receive any meaningful volume of leads through your organization's website? Be prepared to discuss where leads come from and how you qualify them.

- **Account/Contact Management -** This is basic for most all deployments: keeping track of various companies and people. We will enhance the attributes for segmenting your relationships in the discovery meeting during the project.

- **B2B or B2C -** Is your organization a business-to-business (B2B) organization, business-to-consumer (B2C) organization, or both? B2C has special configuration considerations

- **Opportunity Management -** do you expect to track opportunities (also known as deals) or other financial pursuits and develop a forecast? Do you have goals or quotas for your team to track?

- **Quotes -** if you sell a product or service, how do you generate quotes/proposals today? Will you continue to do it the way you have, or do you expect the CRM software to generate these documents for you?

- **Customer Service -** Do you have a dedicated customer service or support team? What software do they use to manage tickets, cases or issues? Do you want the new system to take over this functionality?

- **Portals -** do you need your customers or partners to have login access to portions of your CRM data?

- **On Premise or Cloud? -** are you and your staff comfortable with your data housed in another location with an outside company? Do you have the resources in house for maintaining a new business software application. Both equally have their risks and rewards and need to be considered very carefully.

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