

# Develop Your Project Plan

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**Note** – This is one from a sequence of exercises from the Customer Relationship Management subject outlined in the Strategic Marketing Process eBook. Download the free e-book [www.growthpanel.com/marketing-tools/index.html](http://www.growthpanel.com/marketing-tools/index.html) and subscribe to this subject at [www.growthpanel.com/versions/get-started.html](http://www.growthpanel.com/versions/get-started.html) to download from Growth Panel’s Intelligent Marketing Platform.

*Some of the graphics in this PDF might not display properly.*

When you start to look at software options, it’s important to outline your needs up front. You’ll have an easier time finding the appropriate software vendors and they’ll be able to better match their product to your needs.

## CRM STAKEHOLDERS

Who would use the CRM system (“stakeholders”)? They should all participate in the decisionmaking process.

First, identify the likely users in your company. Here are typical benefits and challenges that each group faces during a CRM implementation.

Department / Users	Major benefits of CRM	Challenges that CRM can cause	Will you involve this department in the decisionmaking process?
<b>Lead Generation</b>	They can transition qualified leads to sales reps more quickly and easily	They have to learn new data entry and management system, which is more difficult at first than current system	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
<b>Sales</b>	CRM can help them shorten the sales cycle, give them the ability to work more prospects at a time, and can help them access important product/customer data in real time	Learning a new system is frustrating and challenging – salespeople prefer to sell, not enter data	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
<b>Sales Management</b>	Better sales management, more accurate reporting and forecasting. CRM coupled	Getting sales reps to use it can be a challenge	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

Department / Users	Major benefits of CRM	Challenges that CRM can cause	Will you involve this department in the decisionmaking process?
	with a good sales process [Sales Process can help] makes it easier to improve reps' performance		
<b>Finance</b>	More accurate sales forecasts provide more time for cash flow management decisions	Getting accurate data into the system	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
<b>Senior Management</b>	Better management of sales, better forecasting	Pain of user adoption	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
<b>Customer Service</b>	Real-time access to customer information; seeing service history can make service easier	Challenging to learn	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
<b>Marketing</b>	Some CRM software can automate electronic marketing campaigns and metrics. Most CRM marketing software can provide ROI measurement for specific campaigns	Justifying cost and challenging to use	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
<b>IT</b>	Centralized system housing customer data. Simplified management requirements	Upfront work in installation, integrating, and debugging	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

Add any additional benefits/challenges you foresee in your situation.

DEPARTMENT	BENEFITS CRM COULD PROVIDE	CHALLENGES
<b>Lead Generation</b>		
<b>Sales</b>		
<b>Sales Management</b>		
<b>Finance</b>		

DEPARTMENT	BENEFITS CRM COULD PROVIDE	CHALLENGES
Upper Management		
Customer Service		
Marketing		
IT		
Other		

From the tables above, choose your selection and CRM teams as well as the final decisionmaker.

### CRM SELECTION TEAM

NAME	ROLE	NOTES
	Final Decisionmaker	
	<input type="checkbox"/> Decisionmaker <input type="checkbox"/> Influencer	
	<input type="checkbox"/> Decisionmaker <input type="checkbox"/> Influencer	
	<input type="checkbox"/> Decisionmaker <input type="checkbox"/> Influencer	
	<input type="checkbox"/> Decisionmaker <input type="checkbox"/> Influencer	
	<input type="checkbox"/> Decisionmaker <input type="checkbox"/> Influencer	

### DOCUMENT YOUR SOFTWARE NEEDS

Now that you've identified the users, benefits and challenges, document the rest of the information that software vendors will ask you before recommending a product.

BACKGROUND INFORMATION	YOUR RESPONSE
# of employees	
# employees in sales and marketing	
# customer service reps	

BACKGROUND INFORMATION	YOUR RESPONSE
# of departments involved	
# other employees that access customer information	
# of customers	
Approximate annual revenue	
Who is your typical customer?	
Do you have budget available?	

YOUR SALES PROCESS	YOUR RESPONSE
How do you currently manage customer data?	
What are your lead sources (website, referrals, email, mailing, partner channel, cold calling)	
How many steps are in your sales process? (Refer to Sales Process section)	
How long is your typical sales cycle (length in days/months)?	
What types of activities do your reps engage in during the sales process? (phone calls, personal visits, emails, quotes, demos, etc)	
Typically, how many different contacts at a prospect company does a sales rep deal with?	
# active leads per sales rep (estimate)	
Do your reps need to access detailed product information? If so, where is it stored?	
If you prepare quotes for prospects, who creates them? If yes, are they stored electronically?	

SOFTWARE INTEGRATION	YOUR RESPONSE
What programs/applications are currently integrated with your existing CRM?	
What programs would be beneficial to be integrated with your existing CRM?	

CUSTOMER SERVICE	YOUR RESPONSE
How do customers contact you? (phone, face to face, email)	
Who handles customer service? (# employees) Are they dedicated reps?	
What issues do the reps handle? Billing questions? Order tracking? Payments? Others?	

REPORTING	YOUR RESPONSE
Do you have accurate revenue forecasting tools in place? [Sales Process can help]	
What types of reports would be beneficial?	
How could you improve your existing reporting?	

## IT DEPARTMENT

IT plays an important role in CRM implementations. Any organization installing CRM software for multiple users must involve IT resources. In large organizations, the IT department plays an integral role in CRM selection and implementation.

TECHNOLOGY QUESTIONS	YOUR RESPONSE
# of computers	
Do you have a network? If so, what type?	
Who manages IT?	
What are your average computer specifications? (year purchased, processor speed, memory, disk	

TECHNOLOGY QUESTIONS	YOUR RESPONSE
capacity, operating system)	
<b>Do you have a high-speed internet connection?</b> If yes, what type and speed? Are all users connected?	
<b>Do you have an automated ERP/ accounting package in place?</b> If so, what? Specify vendor and version.	
<b>Is there value to integrating your CRM package to your ERP/accounting package?</b> If so, what is it? Can you qualify it in money earned/saved or productivity gains?	
<b>Do you need additional IT resources</b> to launch a CRM initiative?	

## IDENTIFY VENDORS

Since CRM is such a broad category of software, there are hundreds of options from which to choose. Here are eight leading vendors that provide CRM solutions that cover most of the general functionality that small- to medium-sized businesses need.

Please note that software products are continually updated and improved. Use this only as a high-level reference guide. Information may change with updated releases, product add-ons and customization.

Some software vendors provide single user copies of the software. Most CRM software implementations require multiple users to be effective. In the # users category, “single” means you can purchase an individual copy.

Company, Target	# users/ scalability	Cost per user	Data location	Ease of use/ integration	Notes
<b>ACT!</b> <a href="http://www.act.com">www.act.com</a> Small to medium businesses	Single; 5 to 20+ if sharing data. Can have thousands of users if they keep data separate. Not scalable beyond 30 users for sharing data.	\$200 to \$300	On premise	Easy to use (over 5 MM users) and a popular program /unable to integrate with most programs without	All but the newest version of the product are built around a contact record instead of an account record. Limited workflow capabilities to incorporate unique business process and

Company, Target	# users/ scalability	Cost per user	Data location	Ease of use/ integration	Notes
				extensive integration costs.	CRM best practices.
<b>GoldMine</b> <a href="http://www.goldmine.com">www.goldmine.com</a> Small to medium businesses	Single; 5 to 20s. Not scalable beyond 50 users.	\$300 - \$600 per user with a server cost and maintenance and support (20%)	On premise	Clunky user interface. Unable to integrate with most programs without extensive integration costs.	Contact centric. Implementation delivered through channel partners who understand CRM. .net architecture. Good workflow. Large user base
<b>SalesNet</b> <a href="http://www.salesnet.com">www.salesnet.com</a> Small to medium businesses	10 to 1,000s	\$70 per user per month	Hosted / open web services API	Process driven so better suited for companies with established workflow procedures. Unable to connect to most programs without extensive integration costs.	Little marketing, support and contact center functionality. Small company. Strong data center.
<b>Right Now Technologies</b> <a href="http://www.rightnow.com">www.rightnow.com</a> Small to medium businesses	10 to 1,000s	Varies depending on version selected.	Hosted and on premise	Right Now has scored well in usability studies. Lots of flexibility integrating with other systems.	Contact center, self service and knowledgebase is their core competence. Publicly-traded company.
<b>Siebel CRM OnDemand</b> <a href="http://www.siebel.com">www.siebel.com</a> Small to medium and mid-enterprise	10 to 1,000s	\$70 per user per month	Hosted + on-premise hybrid model / open web services	Great user interface. Integration with other programs is cost effective	Contact center is the best in the business. Heavy duty data warehousing and analytics engine. Strong sales and marketing

Company, Target	# users/ scalability	Cost per user	Data location	Ease of use/ integration	Notes
businesses			API		automation.
<b>Salesforce. Com</b>  <a href="http://www.salesforce.com">www.salesforce.com</a>  Small to medium and mid-enterprise businesses	Single; 5 to 1,000s can share data	\$60 - \$120 per user per month	Hosted / open web services API	User interface can be hard to navigate. Application allows for extensive customization around workflow and business processes.	Sales and marketing automation; fast-growing hosted CRM vendor.
<b>Microsoft Business Solutions CRM</b>  <a href="http://www.microsoft.com">www.microsoft.com</a>  Small to medium and mid-enterprise businesses	10 to 1,000s	\$70 per user per month for hosted and \$600 - \$1,000 per user for on premise with server costs & maintenance & support (18%)	Hosted and on-premise /open web services API	Easy to use. Great integration with Outlook and Office (built by same company).	New product. Microsoft is serious about being number one in CRM space. Delivered through partner channel but some partners are still learning about the software.
<b>Sage SalesLogix</b>  <a href="http://www.saleslogix.com">www.saleslogix.com</a>  Medium and mid-enterprise businesses	10 to 1,000s	\$70 per user per month for hosted and \$600 - \$1000 per user for on premise with server costs & maintenance and support (20%)	Hosted and on premise	Easy to use and customize. Strong workflow engine and easy to integrate	.net architecture. Leader in customizable CRM. Biggest customer base and user base in the industry.

### NARROW YOUR POTENTIAL VENDORS

Now compare your needs to the vendors in the previous table. Enter your basic needs, then reference the table above to see which vendors match your needs in that area.

NEED	YOUR RESPONSE	POTENTIAL VENDOR MATCHES
Estimated # of users		<input type="checkbox"/> ACT! <input type="checkbox"/> SalesNet <input type="checkbox"/> Goldmine <input type="checkbox"/> RightNow

NEED	YOUR RESPONSE	POTENTIAL VENDOR MATCHES
		<input type="checkbox"/> Siebel CRM OnDemand <input type="checkbox"/> Salesforce.com <input type="checkbox"/> Microsoft CRM <input type="checkbox"/> Sage Saleslogix
<b>Data location</b>		<input type="checkbox"/> ACT! <input type="checkbox"/> Goldmine <input type="checkbox"/> SalesNet <input type="checkbox"/> RightNow <input type="checkbox"/> Siebel CRM OnDemand <input type="checkbox"/> Salesforce.com <input type="checkbox"/> Microsoft CRM <input type="checkbox"/> Sage Saleslogix
<b>Do you need to integrate with other software? If so, what?</b>		<input type="checkbox"/> ACT! <input type="checkbox"/> Goldmine <input type="checkbox"/> SalesNet <input type="checkbox"/> RightNow <input type="checkbox"/> Siebel CRM OnDemand <input type="checkbox"/> Salesforce.com <input type="checkbox"/> Microsoft CRM <input type="checkbox"/> Sage Saleslogix
<b>Do you need the ability to scale the software (i.e. expand)?</b>  If your # of users will increase by 50-100% in one to two years, and/or you will need more integration with other programs and functionality, you will need CRM to grow with you.		<input type="checkbox"/> ACT! <input type="checkbox"/> Goldmine <input type="checkbox"/> SalesNet <input type="checkbox"/> RightNow <input type="checkbox"/> Siebel CRM OnDemand <input type="checkbox"/> Salesforce.com <input type="checkbox"/> Microsoft CRM <input type="checkbox"/> Sage Saleslogix
<b>Budget per user</b>		<input type="checkbox"/> ACT! <input type="checkbox"/> Goldmine <input type="checkbox"/> SalesNet <input type="checkbox"/> RightNow <input type="checkbox"/> Siebel CRM OnDemand <input type="checkbox"/> Salesforce.com <input type="checkbox"/> Microsoft CRM <input type="checkbox"/> Sage Saleslogix
<b>IT resources you have available</b>		<input type="checkbox"/> ACT! <input type="checkbox"/> Goldmine <input type="checkbox"/> SalesNet <input type="checkbox"/> RightNow <input type="checkbox"/> Siebel CRM OnDemand <input type="checkbox"/> Salesforce.com <input type="checkbox"/> Microsoft CRM <input type="checkbox"/> Sage Saleslogix
<b>How important is ease of use?</b>		<input type="checkbox"/> ACT! <input type="checkbox"/> Goldmine <input type="checkbox"/> SalesNet <input type="checkbox"/> RightNow <input type="checkbox"/> Siebel CRM OnDemand <input type="checkbox"/> Salesforce.com <input type="checkbox"/> Microsoft CRM

NEED	YOUR RESPONSE	POTENTIAL VENDOR MATCHES
		<input type="checkbox"/> Sage Saleslogix

Which vendors did you select most often? Contact them and start the evaluation process.

VENDOR	CONTACT INFORMATION	DATE OF INITIAL CONTACT	NEXT STEPS

Some vendors sell through a business partner channel, sometimes called “integrators”. These partners are knowledgeable about the products and can usually install them at your location and customize them to fit your needs.

Make sure to share the information below with your chosen vendors. This information helps them recommend the right solution for you more quickly than they could otherwise.

### MAJOR SOFTWARE NEEDS

# users + ability to grow	
Data Location	
Cost/User	
Integration with other programs	
IT requirements	
Functionality/other modules	
Ease of use	
Notes	

Make sure your sales rep answers all of your questions before you make your final decision. Involve all your stakeholders in the decisionmaking process; it’s important for everyone to have a say in the decision.

CRITERIA	VENDOR A	VENDOR B	VENDOR C
# users + ability to grow			
Data Location			
Cost/User			
Integration with other programs			
IT requirements			
Functionality/other modules			
Ease of use			
Notes			
Positives			
Negatives			
What are the implementation requirements?			
Other			
Other			

Vendor	
Additional notes	

Vendor	
Additional notes	

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<b>Vendor</b>	
<b>Additional notes</b>	

When you select a system, create an implementation plan to ensure that your setup & training process runs smoothly. [Exercise 333]