



# Getting Your Staff on-Board with CRM

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“61% of the UK workforce is employed in SMEs” -  
Federation of Small Businesses

## Introduction

It has become an all too common cliché that software projects often fail. We've all heard about the very public examples of large scale IT investments which go catastrophically wrong; the BBC, the NHS, the Fire Brigade and the e-borders system have collectively received billions of IT investment with no tangible outputs. The Major Projects Authority, the central body now responsible for monitoring large scale projects, is currently tracking 200 projects worth almost £400bn with only 4% given their lowest risk assessment (Guardian, <http://gu.com/p/4vpng/sbl>).

I don't think it is fair to simply pick on the public sector as there are many similar examples in the private sector too; they're just less visible. All too often, IT projects in SMEs fail and whilst the money involved isn't as large, as a percentage of turnover, they're often more damaging than the very public ones we've all heard about.

The most shocking thing about these projects is that they're often used as a shield by software companies against their own shortcomings – it's almost as if it is ok for a software project to fail because so many others do. Too many software companies absolve themselves of blame using this argument. 61% of the UK workforce is employed in SMEs (Federation of Small Businesses). Therefore, we have to find a way to challenge this paradigm and ensure that SME IT projects succeed, thereby delivering the efficiency gains they are capable of.

There isn't an answer that a software provider can find in isolation. CRM implementation is a commercial decision and is as much a change project as it is an IT project; involving technical as well as people challenges. By acknowledging these challenges at the outset, suppliers and customers can work collaboratively and transparently to an agreed project plan that addresses the human and commercial requirements just as much as the technical requirements.



## A Shared Vision

I'm a geek and proud of it, I love designing technical solutions to solve my customers' problems and most people involved in IT feel the same. We want to be working with the latest and greatest technology and we love the bragging rights that come along with delivering a really elegant technical solution because we know how this can improve the business efficiency of SMEs.

Sometimes, the cleverest solution is the best one, but there are all sorts of constraints on a small business, including budget constraints and pre-existing business processes that have evolved rather than been specifically developed. So the job of designing a solution for an SME means that there usually have to be some compromises. The trick to delivering a solution that will actually meet its objectives is to make the right compromises and for that, I think you need to involve as many of the eventual users as early in the project as possible (while minimising business disruption) and not let the geeks run away with the solution.

## Base your solution on the right requirements

The senior managers of an SME will have a clear idea of what needs to change. A good supplier should help challenge and develop these ideas and help build a cohesive IT strategy which also meets the tactical needs of the business. It continues to amaze me how it is often the seemingly smallest piece of perceived functionality shortfall which can de-rail a project. Often it will be something that the senior management didn't even know their team were doing. Most people I meet in SMEs are incredibly hard-working and conscientious and are usually expected to innovate processes and systems rapidly to keep up with the hectic nature of running a smaller business. Even businesses up to £50m or £100m annual turnover frequently don't have clearly defined and documented processes for everything that needs to happen to take an order and get paid. People have usually found a way to get things done with existing systems that can be very efficient and whilst these ad-hoc processes may not be clearly defined or written down and may well not fit into the overall strategy of the business, changing systems without consideration for the day-to-day is a certain way to disrupt business and make a new system fail. Getting business requirements mapped and agreed (including validating data) is a real foundation for success.

“Select a supplier that doesn’t mind spending extra effort really understanding your requirements ”

## Changing a process to meet a system

It’s important, however, not to let the previous system dictate entirely how the new solution is designed. Existing ad-hoc processes may well work for the individual or small team, but are unlikely to have been designed with the strategy of the business in mind. This is where compromises have to be made, and made with the involvement of the team who are expected to use the new system.

If the plan of the senior team is clearly communicated to the rest of the organisation and the supplier is honest about where the company will see improvements with the new system and where there might need to be some adaptation from the existing processes, then this **shared vision** of the project can be generated. Even the best specified solution will not have accounted for every bump in the road and you’ll need everyone involved to keep this shared vision at the forefront if sensible compromises are to be made.

## Don’t scrimp on training

Most people that I encounter want a fixed price project, totally understandable. I certainly feel that the software industry has had a bad reputation for vast project overruns at the expense of the customer but cost overruns cannot also be swallowed entirely by the supplier. What’s particularly important about a project like CRM, is that the customer and the supplier will likely have a long-term relationship which has to be based on trust. With limited resources, things like proper change management planning and adequate training are often bumped off a quote to make it fit the desired budget. This leads to troublesome go-lives with frustrated team members and a longer period until real benefits are felt by the business.





## An Internal champion

To combat a reduced training budget, and to ensure that users don't feel swamped by a new system, it is incredibly important to select a 'super user'; someone who really understands the shared vision of the project and who is technical enough to take ownership of the system but who also understands the business well enough that they can work around the inevitable challenges. With an internal champion, you'll overcome some of the training difficulties without ever having to call in the supplier, and you'll be further along the road of taking control of your new system internally.

## Frequent Reviews

From the start of the project to the go-live date, your requirements may well have changed. If they haven't by the time the solution is live, they will certainly change in the months and years ahead. Make sure that your project champion has access to resources such as best practice blogs, customer forums and training videos but also make sure that your supplier is committed to the ongoing development of your solution. Regular reviews of strategic and tactical goals is important as it ensures that your solution evolves along with your changing business requirements. Often there will be new features or better ways of doing things that you might never have found on your own. A good supplier should stay involved and continue to give regular advice about how to maximise your investment. User group forums are a great way of getting feedback from users and continually improving the solution.

Most IT projects fail not for technical reasons, but usually through lack of thoroughness in mapping business requirements and a lack of adoption by staff. Change is always difficult and the amount of change is frequently underestimated by both customers and suppliers alike. It is imperative to consider not only the strategic business ambitions, but the tactical requirements of the team and how a new CRM system will affect their day-to-day lives. If you want your new solution to be embraced by your team, then involve as many possible as early as possible in the project and make sure you have a shared vision for the project. Select a supplier that doesn't mind spending extra effort really understanding your requirements and who is committed to an after care process that goes beyond basic account management. Demand a supplier who invests in face-to-face support for your team and who conducts regular reviews of progress.

## Final Thoughts....

Most IT projects fail not for technical reasons, but usually through lack of thoroughness in mapping business requirements and a lack of adoption by staff. Change is always difficult and the amount of change is frequently underestimated by both customers and suppliers alike. It is imperative to consider not only the strategic business ambitions, but the tactical requirements of the team and how a new CRM system will affect their day-to-day lives. If you want your new solution to be embraced by your team, then involve as many possible as early as possible in the project and make sure you have a shared vision for the project. Select a supplier that doesn't mind spending extra effort really understanding your requirements and who is committed to an after care process that goes beyond basic account management. Demand a supplier who invests in face-to-face support for your team and who conducts regular reviews of progress.