

# Key stages in the journey of a CRM/Digital project

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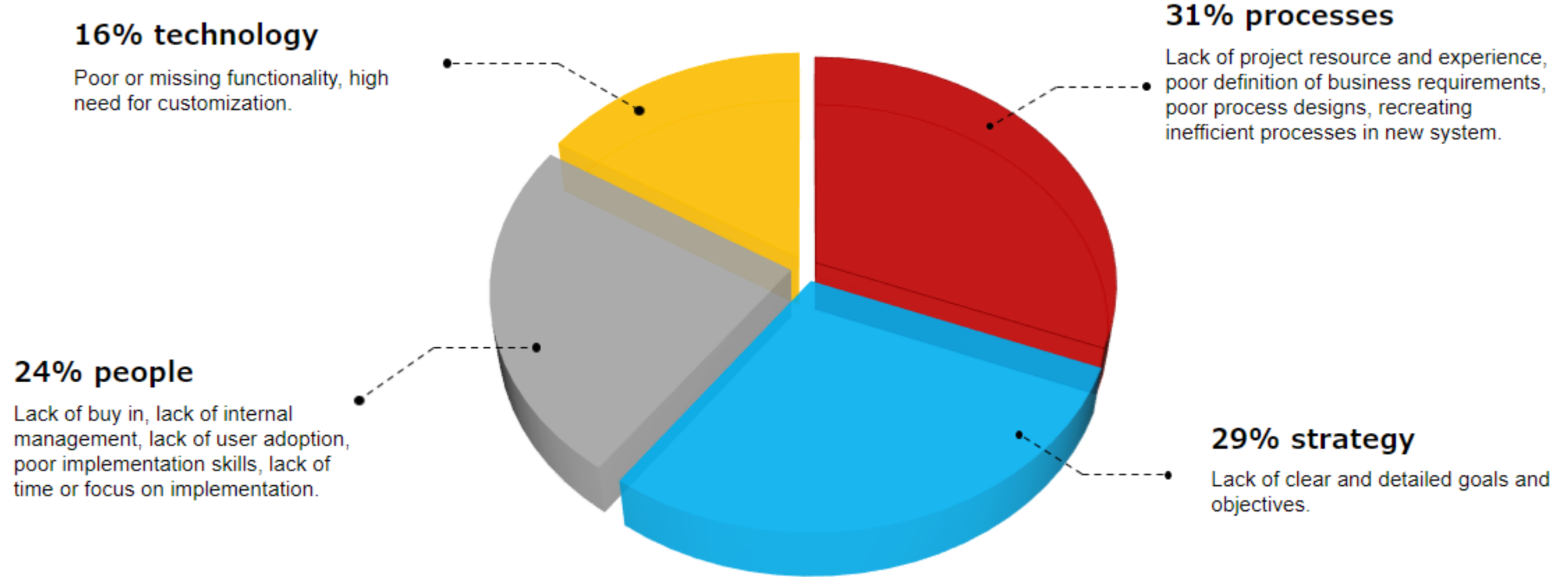
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# Agenda

- 1 Different stages of a project and key considerations
- 2 Resourcing
- 3 Considerations when choosing a technology partner
- 4 Key documents for your project
- 5 Data migration

# Research study

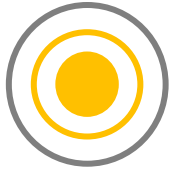




# **Different stages of a project and key considerations**

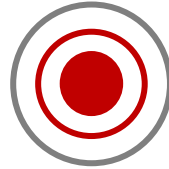


# Requirements gathering



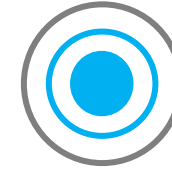
## Where to start

- Reach out to the organisation to find out what the real needs are
- Consider carrying out a Business Process Review (BPR) as a baseline
- Uncover what is working and what isn't



## Collating requirements

- It's not just about who you ask, but what you ask – and how
- A collaborative, as well as an investigative process
- Ideally you want to see staff members beginning to 'take ownership' and feel involved in the process



## Sorting out priorities

- Agree what is essential and what is nice to have
- The requirements will be many and varied. Everyone will have a view, and not all of those views will agree
- You won't be able to please everyone in this process
- Keep the needs and objectives of the organisation the key focus

# Discovery – agreeing the priorities

## What is discovery?

- Partners investigation of requirements with teams
- Partners creation of the project specification

## What does it involve?

- Further workshops with teams
- Agreement of all requirements in detail
- Detailed costings

## Approval and sign off

- Specification and budgets
- Involves team, approved by board

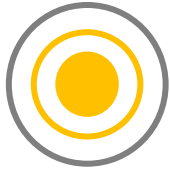
## Contracts and detailed project plan

- Legal agreement between parties
- Implementation and ongoing arrangements
- Detail on project phases and stages

# The importance of testing

- Define the roles & explain responsibility
- Ensure tracking of bugs and issues
- Ensure regular reporting to highlight issues/risks
- Integration testing
- Establish detailed UAT scripts
- Performance testing

# Training



## Plan your approach

- Training plan must include:
  - Schedule
  - Remote or onsite locations
  - Equipment plan
  - Training materials
  - Support leads
- Allow additional time for recap sessions
- Evaluation and feedback



## Use different methods

- Train-the-trainer
- Classroom **and** 1-1
- Virtual meetings
- Written manuals
- Training demos and videos
- Shared learning hub





# Partner management

Manage your partner(s) to provide seamless quality of services, ensuring **value for money**

Understanding the importance of discovery and sign off

Ensure **frequent** and **honest** communication

Closely manage the relationships with partners

Clearly establish roles and responsibilities

Ensure that contracts and agreements are aligned with business needs and support with agreed targets, including SLA's and KPI's



# Resourcing



# Resources and commitment

Resources required have been identified and lined up for the start of the project

Internal governance has been agreed - board meeting frequency, escalation routes, key milestones and decision points

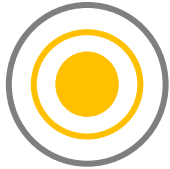
Kick off meeting with the partner

Prepare your project documents – Project Initiation Document (PID) and Project Plan

Data migration prep and planning

Communications plan developed

# The internal project team



## Leadership

- Project board
- Project sponsor

### Leadership tasks:

- Ensures resource availability
- Gives organisational authority
- Champions project
- Supports project team

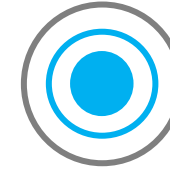


## Management

- Change manager
- Product owner
- Project Manager

### Management tasks:

- Monitoring progress and reporting to project board
- Stakeholder engagement
- Partner management
- Drive the project forward



## Delivery

- Champions
- Subject matter experts

### Team/Champion tasks

- Engage with project
- Ensure fitness for each business area – find issues!
- Testing and sign-off
- Change business processes

# The balance of work across a project timeline

## Project Sponsor

- 0.5 days per week
- Internal role
- Support the project team, hold responsibility for the successful delivery of the project

## Project Manager

- 3-4 days per week
- Internal or external
- Manages, drives and delivers the project

## Business Lead

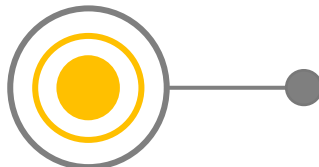
- 2-3 days per week
- Internal role (often shared)
- Provides business insight, decision-making, testing, sign-off

## Data / tech Lead

- 2-3 days per week
- Internal role
- Manages collation, transformation and mapping of all data sources

## Subject Matter Experts

- Varies per week
- Internal role (often shared)
- Provides process insight, test data, integrations and functionality



**Projects require considerable resource – the highest risk is to underestimate this**

# The balance of work across a project timeline – a combined approach for smaller organisations

## Project Sponsor

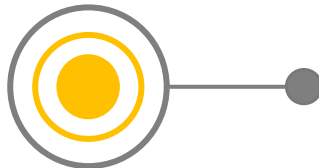
- Internal role
- Support the project team, hold responsibility for the successful delivery of the project

## Project Manager Business Lead Data/tech Lead

- Manages, drives and delivers the project
- Provides business insight, decision making, sign off
- Manages data strand of project

## Subject Matter Experts

- Internal role (often shared)
- Provides process insight, test data, integrations and functionality



Projects require considerable resource – the highest risk is to underestimate this

# The importance of a dedicated project manager/lead

**Organisational skills:** A highly organised person who has a firm handle on how to get the best from the organisation.

**Organisational understanding:** An excellent understanding of the current and future needs of the organisation and a working knowledge of all areas of the business

**Partner management:** Ability to manage partners and their deliverables, ensuring priorities and resources are correctly aligned with internal teams

**Focus:** Conflicting priorities is a major issue.

**Communication:** Great communication skills at all levels within the organisation and with external partners

**Proven track record:** This means experienced in *your kind* of project

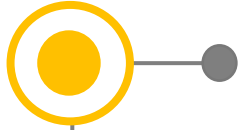


# Considerations when choosing a technology partner

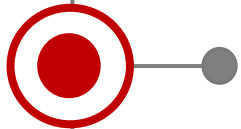




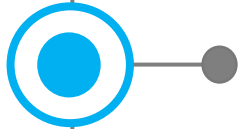
# Potential partner/supplier demonstrations and presentations



Culture and fit are important – you will be working together with them for several months/years



Make sure the potential partners are fully briefed and have enough time to prepare – you don't want to waste anyone's time



Send them an agenda, evaluation focus, and names and roles of the people who will be attending and attendees are prepared with questions

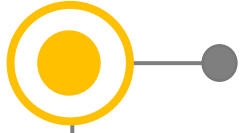


Ask about data migration and who is responsible for what elements

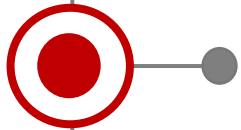


Consider adding business leads as well as senior stakeholders to your demo sessions

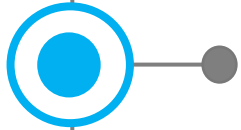
# Selecting a partner/supplier



First and foremost, make sure the potential partners have plenty of time to respond – you want them to do a good job



Agree your selection criteria in advance



Create a comparison matrix relating to your criteria



Read the fine print in terms of costings, don't be afraid to ask for clarification



Be clear on anything that has been taken out of scope or has been moved to a future un-costed phase



# Key documents for your project





# Controlling your projects

- **Project Initiation Document (PID)**

- Purpose: To define the project
- Includes: Objectives, assumptions, governance, roles, benefits, outcomes, budget

- **Project Plan**

- Purpose: Link resources to time
- Includes: Partner-side and client commitments, dependencies

- **Risk register**

- Purpose: Track risks, actions, issues, and decisions
- Includes: Severity of each item, owner, mitigations



# Controlling your projects

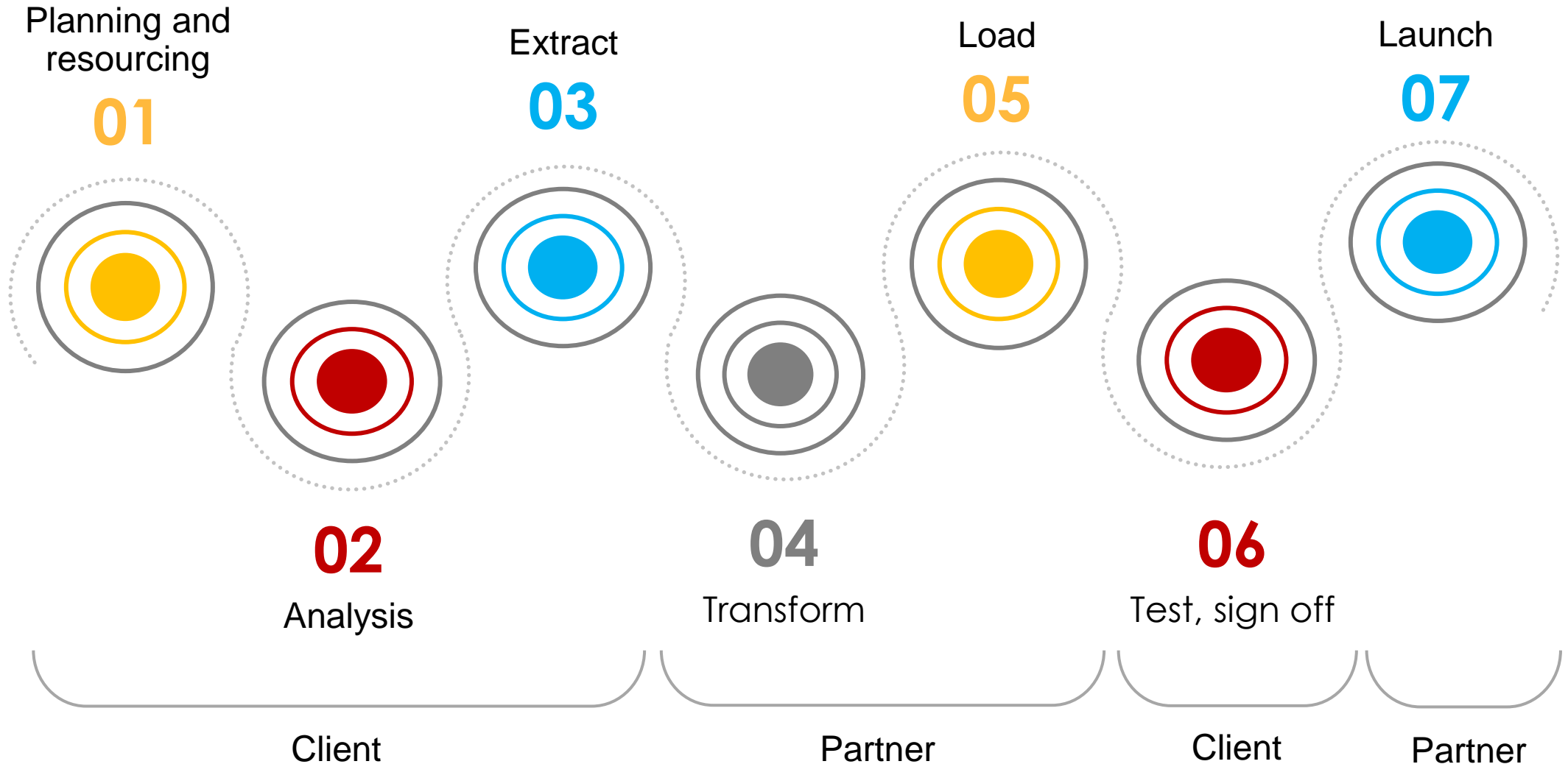
- **Communications Plan**
  - Purpose: Ensure buy-in, take-up
  - Includes: Engagements and messages by stakeholder-type
- **Project board standing papers**
  - Purpose: communicate status to stakeholders.
  - Includes: Progress, status, major decisions, budget
- **Status reports**
  - Purpose: Recording and reporting on project health
  - Includes: Updates of latest project progress, risks and issues



# Data migration



# Data migration – the biggest challenge



**Wrap up**

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# Thank you

For any questions please contact:  
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