STI Systems White Paper

Implementing Your CRM Success

TEN CRITICAL STEPS

How STI Systems' proprietary methodology assures that your CRM Solution will, in fact, deliver the competitive advantages and operational efficiencies you are counting on.

By Jay Bauer, President/Chief Process Consultant, STI Systems, San Clemente, CA

STI Systems, Inc.
Getting CRM Right

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Overview

STI System relies on a highly effective, proprietary methodology, which has resulted in a success rate greater than 85%, considerably higher than the CRM industry average. It addresses all stages of the project from initial proposal and statement of work through requirements gathering, system design, implementation and deployment, training and ongoing support. STI documents each stage in the process and obtains client agreement to insure the objectives of the project are met within the constraints and budget.

1. Needs Assessment Proposal

The initial stage of the STI methodology is the Needs Assessment Proposal. This document reiterates the customer's objectives along with the scope of the project, timeline and known constraints. It outlines CRM system design requirements, as well as the process for gathering the necessary information.

STI also thoroughly documents its requirements for client participation, including the assignment of a client-side project manager. STI then prepares a detailed schedule for the needs assessment process. Based on the schedule, project size and other factors, STI delivers a projected budget.

STI presents the proposal to the customer for approval and signoff. Once approval and initial payment is received, STI will confirm the interview schedule with the client-side project manager and begin work on the needs assessment.

2. Requirements Analysis (RA).

At the beginning of a new project, STI Systems carefully identifies the competitive advantages and the functional requirements anticipated from the new CRM system. This is accomplished by conducting wide-ranging face-to-face and phone interviews with stakeholders throughout the organization. The spectrum of those interviewed includes high-level executives, managers, as well as the staffers who will be using the CRM system.

Objectives of the RA are to capture the business processes, as well as interactions that frequently and routinely transpire between team members and customers/constituents. The interviews also identify integration points with other systems and the type of integration (batch, real time, data feed, screen/web integration, workflow, etc.)

These interviews are transcribed, analyzed and delivered back to the client in the form of a detailed RA, which summarizes the contents of the interviews and calls out critical information and requirements as bullet points. Once completed, the STI Systems' project manager coordinates a review of the document with the original interviewees. The document also gives the reviewers an opportunity to provide additional input. Once these changes have been made, STI Systems submits a final version of the RA for sign-off.

STI takes a top-down approach to delineating competitive advantage requirements and a bottoms-up approach to specifying design functionality. This insures that the ultimate CRM system will meet the stated goals of the executive staff, while providing a comfortable and efficient experience for staff users.

3. Design.

Even before final sign-off on the RA, STI Systems initiates its design process. Our system designers create storyboards depicting each of the key user types and mapping proposed system capabilities to their individual job requirements. Designers update the storyboards as feedback is obtained from the RA process.

Once the storyboards have been completed for all CRM users and business processes, the designers create the high level design, which addresses screen design, data fields and table structure. We also break the requirements and features into three groupings: within scope for phase, future scope and out of scope (not addressed by the requirements from the key sponsor). As soon as the customer has reviewed and signed off on the carefully documented high-level design, STI systems begins the next design phase. This occurs in the field to precisely define the "field attributes", a detailed workflow for business processes and a detailed integration design.

4. Development (Software Customization).

Depending on the customer requirements and complexity of the implementation, development may be concurrent with the detailed design phase. Where appropriate, STI Systems will use third party products and developers to meet the specific customer objectives including functionality, cost and accelerated delivery schedule.

STI Systems routinely integrates off-the-shelf software and hardware to reduce costs, meet critical functional requirements and simplify maintenance. By using open third party applications instead of custom code, STI provides the customer with a more cost-effective CRM system, along with optimized upgrade flexibility. Examples of third party integration include:

- data integration tools
- email integration with Lotus Notes
- address validation tools
- telephony and call center integration, etc.

5. Testing.

Upon completion of the development phase, the project moves into testing. STI fully documents results of its testing program in terms of screen designs, table layouts and workflow process. STI Systems initiates testing by generating test scripts and assisting the internal project manager who assembles an in-house team for testing. The testers rate the beta system for functionality and ease of use while performing the various scripts.

We capture findings from the tests in an issue log that is reviewed by the STI Systems Program Manager and the in-house project teams. Issues are prioritized for development in a report, which must be approved by the internal project manger. Issues reflecting development problems that are not the result of design flaws are listed as bugs. Issues requiring changes in the system design are captured in the Change Control Process. This document identifies whether the issue is within scope of the original project or out of scope.

6. Installation.

STI Systems offers a range of installation services. We can procure equipment and install software, install servers, and configure the installation for security. STI Systems is also available for installation support for those customers who will be setting up and installing their systems themselves.

7. Legacy Migration

STI Systems has integrated to almost every ODBC compliant database using the Scribe Integration Tool or Visual Basic scripts. The key to legacy system migration is careful attention to technical detail, including a precise understanding of the data structure, the data map and the business rules. Specific examples of our experience include:

Integration to legacy systems: custom Oracle financial, custom SAP systems, custom financial systems, Lotus Notes and custom order entry systems, MASS90, MASS200, OMS and EMS conversions from off-the-shelf to proprietary, ACCPAC.

Back end engine systems: Oracle, SQL, Excel, Access, Lotus Notes, Outlook, Yahoo, various web sites, infoUSA (for sales leads).

Data importations: from legacy financials MRP, web sites, ACT, Goldmine, Pivotal, Onyx, Siebel, Lotus Notes, Excel, Access, ASCII, Telemagic, others.

8. Change Management and Quality Assurance

STI Systems provides ITIL-certified quality systems and project management. ITIL is the globally accepted best practice for providing IT Service Management (ITSM) and is ISO9000 compliant (http://www.iso9000-standard.com/9000-process.htm). Critical project managers are ITIL Foundation Certified.

*Change Management***.** One of the key processes in ITIL is Change Management. The concepts from Change Management for Service Delivery can be applied to this CRM project. Changes must be formally requested in an RFC (request for change). Changes must be approved by the Change Advisory Board (CAB). The Change Manager maintains the Forward Schedule of Changes (FSC) - a plan indicating when changes are to be implemented. The FSC becomes a critical document as the project team balances both the forward progress of the project while ensuring the initial pilot sites continue to receive quality IT services.

Quality Assurance. As ITIL experts, we understand that Quality Assurance starts with process management. This means making sure the Quality Management Process is documented and followed, measurable and actually measured. At the start of each project, we work with our clients to determine their Quality Assurance requirements. We find that different clients are at a different level on the Capability Maturity Model (CMM). As a result, the procedures followed to integrate with our client's Quality Management Process must be established on a case-by-case basis.

During this process, we advise our clients on how to improve their Quality Assurance efforts and provide examples of best practices.

9. Strategic and Tactical Support.

STI offers a range of support options for the customer, ranging from standard support from SalesLogix, to customized front line and back line support for STI clients. Customized support offers the benefit of STI staff members who have access to the user's customized solutions. They are prepared to resolve any business process issues that arise from the system and can quickly resolve any system issues. Multiple divisions of Wells Fargo Bank and CCH use STI as their SalesLogix support provider. Wells has given STI a secure network connection and dedicated workstation to resolve problems quickly.

10. Training.

A well-developed and implemented training plan is critical to the success of any CRM deployment. STI has delivered sales and systems training to thousands of users over the last thirteen years. STI training offerings include: classroom, web conference, individual, and train the trainer sessions. STI delivers training using the standard SalesLogix training materials and adding customized modules to reflect the customer's system.

STI believes that users require a minimum of one full day of training on SalesLogix prior to deployment. STI insures that the users are comfortable with the basic functions of SalesLogix as well as the specific customizations that have been developed for the client. STI also recommends a 30-day refresher training program to reinforce best practices, teach advanced functionality and answer all user questions. In addition, we recommend a short retraining every 90 - 120 days to cover any new functionality that may be released. Clients like Wells Fargo have also retained STI to provide individual refresher training.

Become Your Own CRM Success Story

STI Systems is adept at mapping our customers' successful business practices into CRM implementations that provide unique new competitive advantages along with superior operational efficiency.

To find out more, contact our sales department.

STI Systems, Inc
San Clemente, CA.
Tel: 011-949-361-4070
info@salestechnics.com

www.salestechnics.com

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