**The Core CRM Project Plan**

**The #AwesomeCo Salesforce.com “Core CRM Project” will occur in two core phases and two future phases [include date estimates if possible]:**

Phase I: Build the Salesforce.com foundation for sales team (structure defined and designed, including mobile functionality; data migration; pipeline management and reporting)

Phase II: Training and user adoption (client and activity management; page layouts and data movement; usability testing and enhancement design and rollout)

Phase III: Marketing migration (tracking for marketing events and contact/campaigns)

Phase IV and V: System integration with accounts payable and other backend systems

The overarching theme of the Core CRM Project implementation is to provide a user-friendly CRM application that each member of the **#AwesomeCo** team can use to effectively manage account portfolio, pipeline activity and reporting. **The ultimate deliverable of this project is a stable #AwesomeCo Salesforce.com environment, designed to accommodate the agreed upon unique core business needs, with full data migration and end user training (including mobile functionality).**

Gaining a solid understanding of the requirements for a CRM initiative reduces the risk of a failed implementation. By not providing the context, support and understanding for all users --we risk there being limited use of the technology and a frustrating deployment experience, resulting in the lack of adoption of both processes and technology.

In the following pages we will track specific Phase I and II CORE requirements as well as functionality and tasks that will be assessed and executed during future phases of the full CRM Project.

**Key business requirement attributes:**

* Unambiguous
* Testable
* Measurable
* Modifiable

**A successful implementation of this Core CRM Project should entail:**

1. Understanding our business pains.
2. Leveraging technology to automate those business pains.
3. Analyzing the business and helping people to be successful in the business.
4. A universal acceptance that users are crucial to creating and capturing customer information while running business processes within the CRM technology; that if users do not use the technology during daily activities then there is no accurate CRM data (which means no reports, no improvement in efficiency and no foreseeable enhancement to business processes).

**Salesforce Core CRM Requirements Assessment - The Kickoff Meeting Agenda (set expectations)**

1. Review Team Charter and role assignments (personas!)
2. Review project charter information (dependencies, risks, assumptions, etc)
3. Review Current State, analyze existing processes and identify business pains (bombs vs. jams!)
4. Business and Functional Requirements review and brainstorming (future state)
5. Agree on Action Items for next steps

This Business and Functional Requirements document for the Core CRM Project is a documented representation of the project scope and objectives. It includes specific needs that will be incorporated into the new SFDC environment and/or the business functions that must be modified or created to satisfy the business need (and identifies if each will be included in Core initiative or a future phase).

**Team Charter (and Project Role Assignments): *[Make sure all of your stakeholders/ subject matter experts and super users know their role (and make sure they know what your role is)… this is communicating and setting expectations from day one!]***

Document every stakeholder on your project, including a representative set of end users that will use your system, give them all an assigned role and ensure they have an opportunity to be actively involved in the project – the more involvement they have the more they will support you and the new system. Give them ownership and responsibilities throughout the project lifecycle (quality assurance testing is a big one for super users, etc.).

You can group by team or in any other way that makes sense. Just be sure you have the support of an executive sponsor and business owner and then identify your SMEs and or super users on each team. You can group these however you want, sometimes the SME and super users are the same for example.

* **Business Development *(replace this w/the department name of the primary business owner)***

[Enter Name – primary business sponsor]

* + - Senior Sponsor: Articulate the vision of the project and provide support for resource requirements. Aid the team in driving the process modifications required for adoption of the resulting changes.
		- Business Owner: Provide project oversight. Aid the team in driving the process modification required for adoption of the resulting changes. Secure the resources and funding needed for the development, implementation integration and rollout. Remove organizational roadblocks.

[Enter your name]

* + - Project Manager: Responsible for development of requirements, management of project scope, schedule and budget; and securing project resources, both internally and externally, to complete project. Reports progress and escalates issues as necessary to Business Owner and Project Sponsor(s).
		- CRM System Administrator: Responsible for system design, quality assurance testing, conducting initial training sessions for all users and continual support and administration of the technology.

[Enter Name]

* + - Senior Sponsor: Articulate the vision of the project and provide support for resource requirements. Aid the team in driving the process modifications required for adoption of the resulting changes.

[Enter Name – Executive Assistant to the CEO]

* + - Super User: participate in all project activities, work with team to define and document business and functional requirements and continual enhancements. Participate in systems and training documentation development and rollout as needed.

[Enter Name – VP1]

* + - Subject Matter Expert: provide subject matter expertise regarding business needs.

[Enter Name]

* + - Subject Matter Expert: provide subject matter expertise regarding business needs.
		- Super User: participate in all project activities, work with team to define and document business and functional requirements and continual enhancements. Participate in systems and training documentation development and rollout as needed.

[Enter Name – VP2]

* + - Subject Matter Expert: provide subject matter expertise regarding business needs.

[Enter Name – Executive Assistant to VP1/2]

* + - Super User: participate in all project activities, work with team to define and document business and functional requirements and continual enhancements. Participate in systems and training documentation development and rollout as needed.
* **Facility Development:** xxx
* **Advisory Services Team:** xxx
* **Marketing Team:** xx

**Why has #AwesomeCo decided that CRM Technology is important?**

1. Enhanced process and data tracking capabilities through **consistency**.
2. We realize data within the CRM system is as **reliable** as we make it.
3. Real time reports and data analysis will **empower** us.
4. **Consistency, Reliability, and Empowering (ourselves and each other) = true CRM effectiveness**

**Dependencies**

1. Testing will be executed by System Administrator and the Super Users.
2. The migration of current data will be imported into Salesforce.com by System Administrator.
3. New release of xxAssociationxx data for migration should be available in xxxx. [i.e. think about any third party association data you rely on in your industry, etc.]
4. Regularly scheduled data migration of new xxAssociation data, xxPartner updates, and updates to our contacts based on sources such as xxLeadSource, will be handled by System Administrator.

**Risks**

1. Change management and User adoption: The current CRM system has had a 0% end user adoption rate. It is currently used simply as an extension of Excel –as a tool to help the administrator/super user capture high level data as it is provided (through word of mouth, email, digging through individual calendars for meeting information, etc.), which in turn is used to create bi-weekly meeting reports. Gaining adoption by all end users will be a challenge and require an effort to 1) provide enough value in the system, 2) enforce mandatory use, and 3) implement an adequate change management program.
2. Active executive level involvement is necessary.
3. Continual end user involvement is crucial to success
4. Lack of support of the new system by not enlisting key personnel to provide feedback and become lead advocates in training and usage.
5. Full mobility functionality properly implemented and adopted
6. Inability to extract data from current system

**Constraints**

1. Resource constraints – dedicating the right personnel to this project while maintaining a consistently high service level on existing responsibilities
2. Need to develop an implementation schedule that allows for appropriate performance testing and user acceptance while recognizing when resources are extremely tied up with year-end responsibilities.

**Assumptions**

1. The scope for the CORE CRM Project, including application architecture / design, pipeline management, data migration, and mobility functionality will be refined, prioritized, and finalized as part of the final Functional Requirements and design work stream of the project. The final scope for the CORE CRM Project will be based on priority, business need, time and resources allocated.
2. Senior Sponsorship will lead the effort in advocating and enforcing user adoption and integration into daily work activities for all end users.

**Current State – WHAT IS OUR CURRENT PROCESS?**

* **Account and Contact Management**
	+ **Track changes to contact and account information**
	+ **Knowing when the last time #AwesomeCo met with contact/account**
	+ **Holiday card list**
* **BD Meetings (scheduling and tracking)**
	+ **Track individual meetings and the outcome of these meetings**
	+ **Call reports – tasks to follow up and tracking portfolio, investor owned, and client meetings individually (and by region)**
* **Pipeline Management**
	+ **leads and opportunities (stage, history, etc.)**
	+ **Searching for status and other updates**
	+ **Report generation and reliability**
* **Portfolio Management**
	+ **Data Base management: trending reports /asset management – operating margin reports/credit history)**
	+ **Account Name (parent) vs. the individual property/entity located there**
* **Call Reports**
	+ **Track when a call is made to a contact, saving this history to use in the future (individual basis)**
	+ **Setting up reminders to follow up / task management in Outlook / notebook**
* **NPS Survey**
* **RFP response**
	+ **Document preparation and task execution / management (underwriting, intake meetings, etc)**
* **Project management**
	+ **Track project goals and status for ongoing projects**
	+ **Project close-out – client management (change from prospect to client)**
	+ **List of complete projects (in “profile” format) listing details of each project completed**
* **Marketing Campaign tracking and ROI**
	+ **Speaking Engagements / Events**

**Business Requirements and Functional Requirements**

|  |
| --- |
| **NEW CRM PROJECT- Business and Functional Requirements** |
| **BR ID#** | **FR ID#** | **Priority** | **Phase** | **Requirement** |
| **1** | **BR** | **High** | **CORE1** | **Track and organize contact within CRM** |
| **FR** | **F1a** | High | CORE1 | Auto update contact addresses when the account address is updated (if they matched) |
| **FR** | **F1a1** | High | CORE1 | Research title auto fill options (consistency, etc) and add check box to show if address is different from account (otherwise address field is hidden). Also add “preferred name (informal)” field.  |
| **FR** | **F1a2** | High | CORE1 | Add “holiday gift” field (yes/no) if yes then choose “small/med/lg” |
| **FR** | **F1b** | High | CORE1 | Sync contact updates from Outlook to SFDC |
| **FR** | **F1c** | High | CORE1 | Track former roles vs. current roles (i.e. have a process for having no duplicate contacts, but still capturing data from when contact was at former position) |
| **FR** | **F1c1** | High | CORE1 | As a team we decided the “inactive” function would be best for tracking history, etc.  |
| **FR** | **F1d** | High | 3rd | Data control and monitoring. Salesforce.com Administrator to ensure duplicate contact and account records are detected and roles are correctly captured. |
| **2** | **BR** | **High** | **CORE1** | **Track and organize clients and prospects (and referrals/businesses) with efficiency** |
| **B2a** | **BR** | High | CORE1 | [Database] Guide data updates (if you have a 3rd party database you purchase or unique IDs for your accounts, etc.) |
| **FR** | **F2a** | High | CORE1 | Unique [Database] Guide identifier (field named "Guide") --which allows for easy update imports |
| **B2b** | **BR** | High | CORE1 | [Database] data updates |
| **FR** | **F2b** | High | CORE1 | Unique identified (field name "Member ID" -- which allows for easy updates with [Database/3rd party company] website functionality) |
| **B2c** | **BR** | High | CORE1 | Clients vs. Prospects (providers/partners) |
| **FR** | **F2c** | High | CORE1 | "Relationship" field on Account page (Client; Prospect; Business/Referral) – add as a window view to the account page (not a new field) – remove “network relationship” field and form the hierarchy as following: hospital has the network in the “system” field and the “network” account has the system name in the “system” field (make each of the parents account name viewable from the child form) |
| **B2d** | **BR** | High | CORE1 | Referrals (and other businesses) |
| **FR** | **F2d** | High | CORE1 | "Relationship" field on Account page (Client; Prospect; Business/Referral) – add “broker” to the “type” drop down menu on the account form |
| **B2e** | **BR** | High | CORE1 | Track project progress for each product line to ensure client status is reached |
| **FR** | **F2e** | High | CORE1 | Create auto workflow process in SFDC to change "Relationship" field from "Prospect" to "Client" when Stage is changed to "Closed/Won" |
| **3** | **BR** | **High** | **CORE1** | **Have clear understanding of internal activities… how we interact with prospects and clients to help each other be more efficient when we are going about our daily activities.** |
| **B3a** | **BR** | High | CORE1 | BD phone calls |
| **FR** | **F3a** | High | CORE1 | Out of the box SFDC call log functionality -- allows users to log calls as they are made to ensure history is captured for that account/contact |
| **B3b** | **BR** | High | CORE1 | BD meetings |
| **FR** | **F3b** | high | CORE1 | Out of the box SFDC event functionality -- minor changes to the Event Form as the business requests |
| **4** | **BR** | **High** | **CORE3** | **Pipeline Management** |
| **FR** | **F4a1** | high | CORE3 | Design the Opportunity Form for [Company] needs (attach an example) |
| **B4a** | **BR** | High | CORE3 | Enhanced pipeline visibility |
| **FR** | **F4a** | high | CORE3 | Out of the box SFDC functionality -- DASHBOARDS |
| **B4b** | **BR** | High | CORE3 | Relevant pipeline reports for top management |
| **FR** | **F4b** | high | CORE3 | Out of the box SFDC functionality -- REPORTS (modified to look the way we need them to) |
| **B4c** | **BR** | High | CORE3 | Report Meeting metrics |
| **FR** | **F4c** | high | CORE3 | Out of the box SFDC functionality -- REPORTS (modified to look the way we need them to) |
| **B4d** | **BR** | High | CORE3 | Report Hit Ratio (win/loss) |
| **FR** | **F4d** | high | CORE3 | Out of the box SFDC functionality -- DASHBOARDS / REPORTS (modified to look the way we need them to) |
| **B4e** | **BR** | High | CORE3 | Report Proposals (issued vs. outstanding) |
| **FR** | **F4e** | high | CORE3 | Out of the box SFDC functionality -- DASHBOARDS / REPORTS (modified to look the way we need them to) |
| **B4f** | **BR** | High | CORE3 | Easily understand relationship management status (meetings, etc) |
| **FR** | **F4f** | high | CORE3 | Out of the box SFDC functionality -- REPORTS (modified to look the way we need them to) |
| **B4g** | **BR** | High | CORE3 | Increase close rates through management of daily activities and higher efficiency (access to data) |
| **FR** | **F4g** | high | CORE3 | Out of the box SFDC functionality -- DASHBOARDS, EVENTS, TASKS, CALL LOGS, REPORTS |
| **B4h** | **BR** | High | CORE3 | Dashboard to display top deals and win rates |
| **FR** | **F4h** | high | CORE3 | Out of the box SFDC functionality -- DASHBOARDS |
| **B4i** | **BR** | High | CORE3 | [3rd party partner] pipeline items (track and report) |
| **FR** | **F4i** | high | CORE3 | Out of the box SFDC functionality -- REPORTS (Modified to include VHA fields) |
| **B4j** | **BR** | High | CORE3 | Track forecasted revenue from all profit centers |
| **FR** | **F4j** | high | CORE3 | Out of the box SFDC functionality -- DASHBOARDS / REPORTS (modified to look the way we need them to) |
| **5** | **BR** | **High** | **CORE1** | **Portfolio tracking and relationship management** |
| **B5a** | **BR** | High | CORE1 | [Company] properties/assets (owned vs. managed) |
| **FR** | **F5a** | high | CORE1 | Design Account Form to include necessary fields to run the portfolio reports |
| **B5b** | **BR** | High | CORE1 | [Parent company] legacy properties |
| **FR** | **F5b** | high | CORE1 | Design Account Form to include necessary fields to run the portfolio reports |
| **B5c** | **BR** | High | CORE1 | [Acquired] legacy properties  |
| **FR** | **F5c** | high | CORE1 | Design Account Form to include necessary fields to run the portfolio reports |
| **6** | **BR** | **Med** | **3rd** | **Project based tracking** |
| **B6a** | **BR** | Med | 3rd | Development projects |
| **FR** | **F6a** | high | 3rd | Out of the box SFDC task functionality -- allows users to create tasks and assign to others to ensure task management and project status FROM THE WON OPPORTUNITY FORM |
| **B6b** | **BR** | Med | 3rd | Advisory projects |
| **FR** | **F3c** | high | 3rd | Out of the box SFDC task functionality -- allows users to create tasks and assign to others to ensure task management and project status FROM THE WON OPPORTUNITY FORM |
| **7** | **BR** | **High** | **CORE5** | **Track and organize tasks, meetings and calls** |
| **B7a** | **BR** | High | CORE5 | Enhanced team reports showing action items, meetings and calls |
| **FR** | **F7a** | high | CORE5 | Design custom REPORT |
| **B7b** | **BR** | High | CORE5 | Auto process work flows for to do and follow up items regarding deals and meetings |
| **FR** | **F7b** | high | CORE5 | Design customer process work flows within SFDC -- need to define |
| **B7c** | **BR** | High | CORE5 | Outlook integration (first for administrator then for all end users during 2nd phase) |
| **FR** | **F7c** | high | CORE5 | Install Outlook integration package and work with IT team to ensure release is smooth |
| **B7d** | **BR** | High | CORE5 | User Profiles defined -- system administrator vs. Assistant vs. management/sales team (lock certain fields for existing accounts/contacts --changes to these to be routed through system administrator) |
| **FR** | **F7d** | high | CORE5 | Lock all "NAME" fields -- can't modify any name field even if you are the owner, must notify (use “task” or a “form”) administrator --other field related rules to be defined as well |
| **B7e** | **BR** | High | CORE5 | Various page views based on User Profiles |
| **FR** | **F7e** | high | CORE5 | marketing and analyst view to be designed based on fields they need to see (sales team will not see these fields) |
| **8** | **BR** | **High** | **CORE1** | **Quantify why deals are lost to key competitors** |
| **B8a** | **BR** | High | CORE1 | As opportunities are lost, track competitor wins |
| **FR** | **F8a** | high | CORE1 | Custom field to appear when "Reason Lost" = lost to competitor --select competitor account to relate to the loss |
| **9** | **BR** | **High** | **CORE2** | **Data Migration** |
| **B9a** | **BR** | High | CORE2 | [3rd party purchased data if applicable] (accounts and contacts) |
| **FR** | **F9a** | high | CORE2 | Ensure all fields are represented and captured |
| **B9b** | **BR** | High | CORE2 | Existing pipeline data from CRM or Excel or Word, etc. |
| **FR** | **F9b** | high | CORE2 | Migrate active pipeline data from outside systems/Excel (ensure all fields are represented) -- migrate all contacts associated to each active account too |
| **B9c** | **BR** | High | CORE2 | Marketing’s updated marketing contact list (used in last marketing campaign) |
| **FR** | **F9c** | high | CORE2 | Migrate the "Scrubbed" contact list from marketing -- marking each scrubbed contact with unique field |
| **B9d** | **BR** | High | CORE2 | Capture client data |
| **FR** | **F9d** | high | CORE2 | Custom fields used to define Clients and portfolio data |
| **B9e** | **BR** | High | CORE2 | Existing meeting data from outside systems |
| **FR** | **F9e** | high | CORE2 | Plan to migrate the existing meeting data from Excel |
| **B9f** | **BR** | High | CORE2 | Existing businesses (referrals) from outside systems |
| **FR** | **F9f** | high | CORE2 | Migrate active businesses (referrals) from outside systems -- define |
| **B9g** | **BR** | High | CORE2 | All other existing contacts in Outlook for clients |
| **10** | **BR** | **High** | **CORE4** | **Mobility Functionality** |
| **B10a** | **BR** | High | CORE4 | Ensure mobility features are set up and functioning in time for training |
| **FR** | **F10a** | high | CORE4 | Design mobile features and test to ensure working properly on MOBILE |
| **11** | **BR** | **High** | **3rd** | **Marketing campaigns and tracking** |
| **B11a** | **BR** | Med | 3rd | Capture leads from the Web site |
| **B11b** | **BR** | High | 3rd | Campaign management |
| **B11c** | **BR** | High | 3rd | Lead Generation (territory assignments, etc) |
| **12** | **BR** | **High** | **CORE1** | **Collaboration and communication** |
| **B12a** | **BR** | High | CORE1 | Chatter |
| **FR** | **F12a** | high | CORE1 | Enable chatter and train on functionality (install Chatter Desktop) |
| **13** | **BR** | **High** | **CORE5** | **Training (user adoption)** |
| **B13a** | **BR** | High | CORE5 | Ensure users are engaged with multiple training sessions and quick tips.  |
| **B13b** | **BR** | High | CORE5 | Enable chatter "town hall" group so that users can post questions as they work --responses are then captured for the future and other users can benefit from reading the posts |
| **B13c** | **BR** | High | CORE5 | Usability Testing (w/immediate enhancements as necessary) |
| **15** | **BR** | **High** | **5th** | Project close out |
| **B15a** |  | High | 5th | Document lessons learned |
| **B15b** |  | High | 5th | Write close out doc explaining how continual enhancement projects will be planned |

**Sign Off**

**Business Owner/Senior Sponsor**

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[Enter Name]

EVP, Business Development

**Project Manager**

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[Your Name]

Salesforce.com Administrator

**Misc. resource materials used in preparation of this document:**

1. Ten Steps to CRM Success | A Customer Relationship Management White Paper

<http://www.1stdirect.com/goldmine/Premium/Docs/10%20Steps%20to%20CRM%20Success_Final.pdf>

1. Salesforce.com –Workbook and other how-to videos, blog posts, and learning center entries