

Building a Tactical CRM Roadmap

Our client had the strategy - they needed a plan that laid out the “how-to” in order to achieve their CRM goals.

“We now have a plan that is beyond CRM theory – providing a tool for organizational buy-in and the next phase of project planning.” – Vice President, Customer Satisfaction, Mid-Market Manufacturing Company

Business Issue

An American division of a global Japanese company that traditionally sold its product through distribution needed to develop a plan for gaining a better understanding of the end user to increase market share. To achieve this objective, they determined that a CRM program would address these significant challenges. In theory, they knew that a CRM project was needed, but lacked a tangible understanding of what a CRM project meant for them and how it would impact the global operation.

The company successfully implemented an ERP system a few years earlier by defining success based on business goals and sticking to the basics. They felt that this approach was also appropriate for CRM. The company also recognized that change management issues are the biggest obstacles to a successful CRM program. Therefore, the tactical CRM Roadmap also needed to be a tool for communicating the CRM goals and objectives throughout the organization to promote understanding and achieve buy-in.

Adroit's Role

Adroit was hired to work with the client to develop a tactical CRM Roadmap.

Stages in the engagement included:

- Perform a CRM Readiness Assessment to identify executive management and operational issues that will help or hinder CRM.
- Performed an operational assessment to understand the priorities and sequence based on business function.
- Developed a vendor analysis to narrow down the vendors to those that best fit their environment.
- Created a tactical CRM Roadmap identifying the business functions that will be deployed within each phase of the project.
- Determined the project ROI
- Issues and risks

Outcome

The results of Adroit's analysis and advice led to:

A CRM Roadmap with a level of detail that allowed the client to move forward with tangible project planning and organizational buy-in.

An understanding of what it will take to support a successful CRM program, including:

- A phased plan for achieving their business objectives.
- The true cost of the implementation – beyond the technology – including items such as required internal resources, external resources, maintenance costs and benefit vs. cost of deployment over time.
- An independent assessment of the organizational and change management issues that will need to be addressed