

CRM Implementation

Gaining executive commitment is key critical for successful CRM implementation

“Our CRM project team did a great job at defining user needs but without Executive and Sales Management embracing the usage of the CRM tools low adoption would occur within the user community and the project would ultimately fail.”

Business Issue

A global leader in the food ingredients and flavors market had an immediate need to move to a customer centric model to take advantage of opportunities spanning five US and Canadian business units. To achieve this objective, the client decided to implement an enterprise-wide CRM tool.

Although there was general support of the CRM initiative at the user level, the executives had not been engaged in the process.

The pace of roll out required a strategy ensuring there would be enterprise wide adoption.

Adroit's Role

To develop a process for engaging and gaining support from the Executive teams across all business units.

Developing a roadmap to define Executive CRM needs.

Stages in the engagement included:

- Creating a roadmap defining Executive activities and business unit resources required for the CRM Project
- Defining process and project plan for gathering Executive team CRM business requirements
- Gathering Executive and Sales Management reporting and CRM usage requirements for pilot division
- Developing “Day-in-the- Life” scenarios. Scenarios are the a baseline for creation of the Executive and Sales Management training
- Providing input to the CRM guide for Executive Level commitment and activities for CRM Implementation

Outcome

The client gained an understanding of how critical Executive and Sales Management commitment is for a successful CRM program.

A process that:

- Defined minimum levels of commitment from Executives and Sales Management
- Identified reporting requirements for each Executive and Sales Manager
- Defined Executive and Sales Management Business Requirements including reporting needs
- Developed scenarios for the requirements providing the baseline for Executive and Sales Management “Day-in-the-Life” training

The client was able to continue roll out beyond the piloted division and develop supporting tools and aides to ensure adoption.