



LogiCRM
Unlock your Customer Potential

Consultancy

We focus on consultancy from the ‘front end’, meaning we approach projects from the business and user perspective using practical, well proven and workable strategies.

Whatever the state of your CRM Technology, if you are a growing and successful company, looking after and retaining clients as well as acquiring new ones is crucial, particularly in this ever more so competitive and technologically led environment.

The LogiCRM Consultancy Services will enable you to do just that. We will look in detail at all the operational areas which you want reviewed. These may have resulted as recommendations from a LogiCRM Health Check or from your own inhouse investigations and priorities. With all projects we work closely with our clients' teams.

As our focus is from the 'front end', we approach a piece of work from the company and user perspective generating practical and well proven strategies. When the business can see that it can achieve its objective it adds more momentum and purpose to the Programme.

Here are some of the Services which LogiCRM have provided for Clients:

■ **Stakeholder Pre-Project Preparation and Readiness for Change**

To ensure successful CRM, to review the inevitable changes that will happen when CRM technology is rolled out, to prepare for usage by each user type. To ensure that stakeholders are aware that the implementation of CRM technology means change and thus all the actions which need to be taken to prepare for this need to be reviewed. To build the vital support, motivation and encouragement which is required from all levels and all divisions within the business, but particularly from senior management.

■ **Gathering Business and Functional Requirements for any Implementation**

LogiCRM in conjunction with your project team will generate a clear and detailed set of requirements. This set will be used as the basis for system selection. We will ensure that the needs of all users and departments are included and agree priorities for phase 1 and future roll outs. As part of this to determine your plan and timescales so that each business department or team gets something from the first phase.

■ **System Selection**

Choosing the correct system should not be made just by listening to CRM software sales people. It is their job to sell their product. We can lead on or be part of the System Selection team.

Vendors will be whittled down to a small number of potential solution providers based on how well they meet the requirements as well as the success they have had in achieving implementation which have met their objectives. In addition to the Detailed Requirements document, we will generate a set of relevant scenarios which all potential vendors will be expected to show how they would be handled. We would 'kick the application tyres' and decide, with you, how closely your needs are met. Simplicity is key.

As part of the exercise we would determine the business friendliness of the vendors and/ or any business partner to understand whether they are able to provide best practice operational advice as well as good technical support.

■ Project Management, Implementation and Testing

Rolling out CRM Technology is one of the most difficult things to do. Many different teams and users will be asked to update the same database, so where different agendas, reporting lines, terminology, compensation and attitude may be involved, these may have a conflicting effect on the implementation. To make sure this doesn't happen requires a combination of communication, compromise, care as well as agreement between teams to make it run smoothly.

As part of this, the plan, timescales and budget have to be agreed upfront.

While this may appear to be just about technology, it's not, so don't take your foot off the User Adoption, Involvement, Benefits, Communication and Ongoing Support pedals.

LogiCRM will lead, motivate and/or mentor your team to ensure that the system rolled out is in line with your business objectives and expectations, that it meets the fit for purpose requirements and is simple to use – so vital for the vast majority of users.

We have experience of all the stages including requirements generation, functional spec generation, system selection, tyre kicking, configuration, testing, training, roll-out and the ongoing support for both product and system. We will be on hand and work with you to make sure the business and user's perspective is always kept at the forefront of the project team so that the final system, related process, data and people issues match your expectations.

We believe that a phased implementation is preferable to 'big bang' and would expect to trial the rollout with a highly motivated Pilot Group, as part of the process of building internal motivation and value.

■ Generation of a Data Strategy

GDPR has focused minds and, quite rightly, raised the awareness of data importance within organisations. The recent work done to satisfy this most recent regulation can be used as a basis to generate a long term data management strategy. Along with poor user adoption, bad data is one of the main reasons for CRM failure, so the returns from producing such a strategy are both long term and large.

LogiCRM can advise on the following:

- To determine the data nuggets required to run your business
- To identify the location of all the databases which host this data and establish in how many places each item is being held
- To determine the location of the client data repository – in CRM and / or elsewhere and the master data source
- To agree a data ownership protocol, necessary down to record field level, (between sales and marketing, for example)
- To generate a clean data programme such that key data is verified and cleansed on data entry
- To agree consistent terminology and language company-wide, particularly when data is being imported from multiple sources
- To plan a single point of truth (SPOT Strategy), with identifiable master data and integration rules
- To review reporting formats and content to enable more flexible and faster report generation

■ Change Management, User Adoption and Training

To focus on encouraging all users to use CRM. Looking holistically at people, data, processes as well as the simplicity and ease of use of the system.

From data consistency and terminology, to benefits, to easy data entry, to use of positive language, to management and to ensuring that go-live training is simple and to the point.

To work with senior management to roll it out as part of the overall CRM technology Programme.

For more information or to discuss how LogiCRM can Unlock Your Customer Potential, please contact us on:

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