



How Business Process Definition Can Rescue Your Rollout

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Automating business processes can result in substantial cost savings through the creation of new efficiencies. However, companies must manage the automation process itself to prevent "scope creep" -- the introduction of many small changes to suit individual preferences.

Companies deploy CRM solutions to improve business performance, maximize customer relationships and enhance customer service, but many deployments fail to meet expectations.

There are many reasons technology rollouts fail, from lack of planning to lack of funding, but there's another, less-understood culprit: poorly defined business processes. Many companies expect to reap benefits from the automation capabilities of technology, but without careful evaluation, they can end up automating bad business processes.

Steps to Deployment

Following are four steps to help companies be more successful deploying a CRM solution that achieves true business benefits while building a foundation for future success.

1. Take Stock of Existing Processes

Just about every company can save time and money by automating tasks and procedures. The first step in achieving the benefits of automation is to fully understand the processes to be automated. Some organizations we work with have no process documentation. Others have binders full of information, but it is out-of-date or incomplete. Few companies have a well-documented, current record of their core business processes. It can be time-consuming to detail daily business activities, but it is time well spent: A well-documented set of business processes makes it far easier to deploy technology, and more importantly, it provides insight into the entire business workflow. Well-documented processes offer better business insight.

2. Review Each Process

Once you have established the "what" of your business processes, it's time to understand the "who" and the "why." Who is responsible for each step? Where does the information flow? Why does your company follow this particular process? If the process does not support business objectives or improve business performance in a meaningful way, then it might be time to jettison it. There is no room for "we've always done it this way." When too many bad, superfluous or repetitive processes become ingrained in daily operations, a business stagnates.

This is a difficult part of a technology deployment for several reasons. First, it takes time that companies often haven't budgeted for their technology rollout. Second, it can ruffle a lot of feathers internally when the team responsible for deployment continues to question how and why people perform their jobs. Some companies avoid the step entirely and force the technology to automate existing processes -- often at great expense for modifications. However, if business performance improvement is your company's ultimate goal, it's vital to question the validity of each process.

3. **Manage Change**

It's one thing to reject a bad process; it's another to protect a good one. If your CRM technology solution does not offer an easy way to manage and automate a good process, it's worth it to invest in a custom modification, particularly if it supports your core business objectives. Modifications can quickly get out of hand, though, unless you institute a formal change review/approval process. The CRM implementation team must control the prioritization of requested changes and designate one member to have final-sign-off authority for any request. This is the only way to avoid "scope creep," where project costs escalate out of control and deployment dates get continually pushed back.

The team that manages the change review process is responsible for measuring needs against wants, and identifying the changes that will deliver true business benefit. This team must establish firm ground rules to avoid spending time and money on unnecessary modifications. It can be a tough job, as, invariably, the team will have to deny users' requests to modify the software rather than their routines or processes -- but a list of "little changes" can quickly add up to a long list of custom programming. Also, each "little change" has the potential to impact some other mission-critical aspect of the deployment.

4. **Take It One Step at a Time**

At this phase of a deployment, when processes are scrubbed and change requests are approved, teams are naturally very eager to start implementing the software. Yet, invariably, the project "go-live" date is threatened by the list of modification requests. There is a way to start realizing the benefits of deployment sooner rather than later by implementing a phased deployment. Rather than waiting until every single change is addressed, companies can prioritize mission critical changes and identify those that can be managed in later stages. By phasing in system functionality, companies can maximize return on investment by making immediate improvements in their operations. They can address critical needs right away and enable users to become familiar with the system, easing the adoption of future changes. Phases can be separated by as little as two to four weeks, creating a continuous stream of process improvement with minimal disruption to the organization.

Implementing these four steps can make a big difference in how successful a company will be with a CRM technology rollout. However, choosing the right technology partner is just as important as managing the process. External vendors have worked with multiple companies and can provide invaluable advice on which business processes make sense and which deserve a second look. While you might not want to take every piece of advice the vendor offers, make sure that the company you choose to work with has experiences to share. It makes a lot of sense to listen when the vendor pushes back on modifications or programming requests -- they can save you time, money and disappointment.

The winning combination for a CRM technology deployment is the right vendor partnership plus the commitment to define, refine and automate your business processes. **ECI**