

# Rapid Implementations

Microsoft Dynamics CRM

“Rapid Implementation  
in 30 Days or Less”

White Paper

Date: June 2, 2006



---

# Table of Contents

<b>The Implementation Challenge</b> .....	<b>3</b>
<b>The Rapid Implementation Methodology</b> .....	<b>4</b>
Methodology.....	4
Change Management.....	7
Lessons on Adult Learning.....	8
<i>Experiential Learning</i> .....	8
<i>Retention Limits</i> .....	9
<b>What Customers Say</b> .....	<b>9</b>
<b>What to Expect from Your Partner</b> .....	<b>10</b>
<b>Summary</b> .....	<b>11</b>
<b>About The Author</b> .....	<b>11</b>
<b>About Vox Wireless</b> .....	<b>11</b>

## The Implementation Challenge

Business is replete with lengthy and poor Customer Relationship Management (CRM) implementation cycles and methodologies, project cost overruns, and poor sales force adoption. **By contrast, the Microsoft CRM rapid implementation methodology results in earlier project successes, earlier sales force adoption and quicker results to the organization's top and bottom lines.**

Focusing on rapid response and early successes is a known concept, supported by the Extreme Chaos, The Standish Group, 2001 Report, where minimized scope is one of the top 5 reasons for project success.

A management team generally has two main compelling reasons to implement CRM as demonstrated below (see Figure 1 - Elements of Change). They can be categorized as **push and pull drivers**.

The **push drivers** are those compelling threats or pain points that may exist in the status quo for the organization. Pain points that need correction may range from the lack of sales processes, poor sales, silos of information, poor customer service, to, lack of marketing tools. The **pull drivers** are the compelling benefits of the change. Benefits, for example, might be establishing new markets or service offerings. By this point, considerable time and effort has been

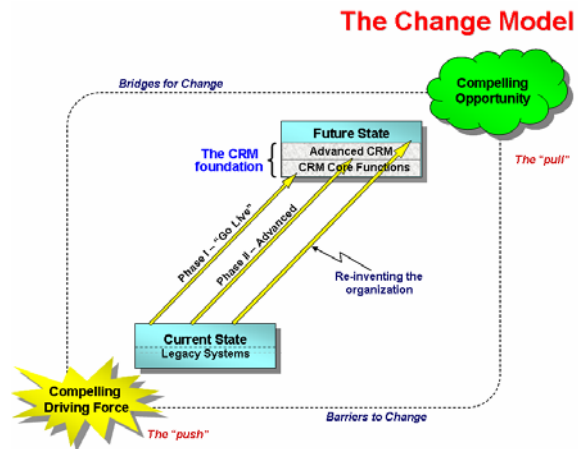


Figure 1. - Elements of Change

invested by key stakeholders and as a result, significant organizational momentum and interest has been achieved by them. They are anxious to see a return on their efforts.

**With traditional implementation strategies**, the implementation project team or steering committee, must define in detail, the system configuration and business processes that are required to reach the future vision and solve current business needs. By focusing on the final target, the project team enters a lengthy, detailed analysis phase where no immediate business value is delivered, except for a design and process document that describes how the system will eventually achieve the corporate vision. **The fundamental flaw in this approach is that in attempting to address all future needs at the beginning of a project, you add a higher level of complexity to the solution at a stage when the understanding of how best to apply the software tools and technologies to the business, is least understood.**

Success Factor	Weight
Executive Support	18
User Involvement	16
Experienced Project Manager	14
Clear Business Objectives	12
Minimized Scope	10

Reference: Extreme Chaos, The Standish Group, 2001

Table 1. - Project Success Factors

*The second flaw in the traditional implementation strategy is that it delays the critical event in an implementation: the time when the users of the software get their hands on it and attempt their daily routines with the software.* Then, and only then, do they begin to understand the value and implications of the CRM system. This is that moment when familiarization with the application spreads, rapidly decreasing individual learning curves, and paving the way for further expansion of the CRM system's capabilities. No matter how detailed the design process was, most often, reality defies the original assumptions and decisions, requiring many adjustments to be made for maximum effect.

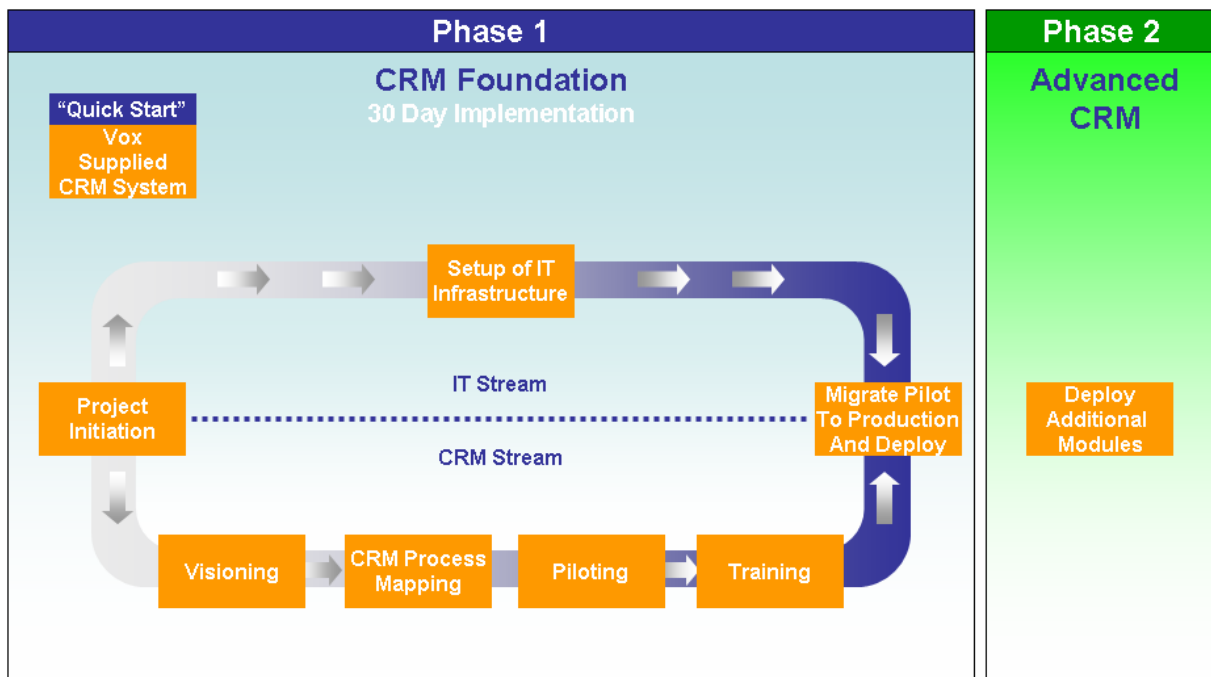
## The Rapid Implementation Methodology

The rapid implementation methodology focuses on three fundamental concepts,

1. Methodology - Guiding the "30 Day" Rapid CRM Implementation
2. Change Management - "its all about people and process"
3. Lessons on Adult Learning

For presentation purposes, these concepts are discussed separately below, but in actual fact, each is complementary and integral to the other. The focus here is on removing traditional project success barriers and establishing an implementation schedule that introduces earlier deliverables and successes with a limited scope project and core functionality of the CRM system.

### Methodology



**Figure 2. – The Rapid Implementation Methodology**

*The Rapid Implementation Method requires that the implementation follow two separate, but converging streams of project activities: the IT stream and the*

**CRM stream, as shown in Figure 2.** Upon initiation of the project, the **IT stream** is focused on the establishment of all technical components necessary for the CRM production environment. The objective of the IT stream is to have the CRM software installed in the production environment and ready for the final migration of all data and system customization and configuration.

Running concurrently is **the CRM stream**, lead by the project team’s business specialists. To ensure that the CRM team can begin the design and piloting sessions, the first step is to ensure that a pilot CRM environment is immediately available for the team. This “Quick Start” approach can be facilitated any number of ways, but the most efficient method is through the use of a virtual machine running a CRM application image and delivered as a temporarily hosted service via the internet. Alternatively, local images can be installed for this purpose, but this alternative requires IT time for installation and sourcing equipment to run the image. The CRM configurations completed in this development environment provide the means for piloting process decisions, and for hands-on CRM experience for the CRM project team, and key system stakeholders. Using standard Microsoft CRM functionality, the completed configurations are exported in XML format and ready for deployment in the production environment.

**Approaching the CRM implementation in this manner eliminates the typical delay in establishing the IT environment, and allows you to jump start the applications configuration and process design without losing time or duplicating efforts.**

Removing the IT infrastructure as a determining factor in the implementation schedule is key. However, is only one characteristic of the rapid implementation method. It must be complimented with a well defined sequence

**Table 2 – Implementation Process Summary**

Envision	Plan & Design	Configure & Develop	Deploy & Train
<ul style="list-style-type: none"> <li>• Kick-off Meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Screen Design &amp; Configuration Meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Design Screens</li> </ul>	<ul style="list-style-type: none"> <li>• Install Server &amp; Clients</li> </ul>
<ul style="list-style-type: none"> <li>• Technical Assessment</li> </ul>	<ul style="list-style-type: none"> <li>• Data Planning</li> </ul>	<ul style="list-style-type: none"> <li>• Build Data Migration Scripts</li> </ul>	<ul style="list-style-type: none"> <li>• Live Deployment</li> </ul>
<ul style="list-style-type: none"> <li>• Pilot Environment Setup</li> </ul>	<ul style="list-style-type: none"> <li>• Solution Configuration Document</li> </ul>	<ul style="list-style-type: none"> <li>• Provide Legacy Data</li> </ul>	<ul style="list-style-type: none"> <li>• Live Data Import</li> </ul>
<ul style="list-style-type: none"> <li>• Discovery Meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Data Migration Specifications</li> </ul>	<ul style="list-style-type: none"> <li>• Test Data Import</li> </ul>	<ul style="list-style-type: none"> <li>• Train End Users</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Project Charter</b></li> </ul>		<ul style="list-style-type: none"> <li>• Conduct User Acceptance Tests</li> </ul>	<ul style="list-style-type: none"> <li>• Train Administrators</li> </ul>
<ul style="list-style-type: none"> <li>• Project Plan</li> </ul>		<ul style="list-style-type: none"> <li>• Develop Training Materials</li> </ul>	

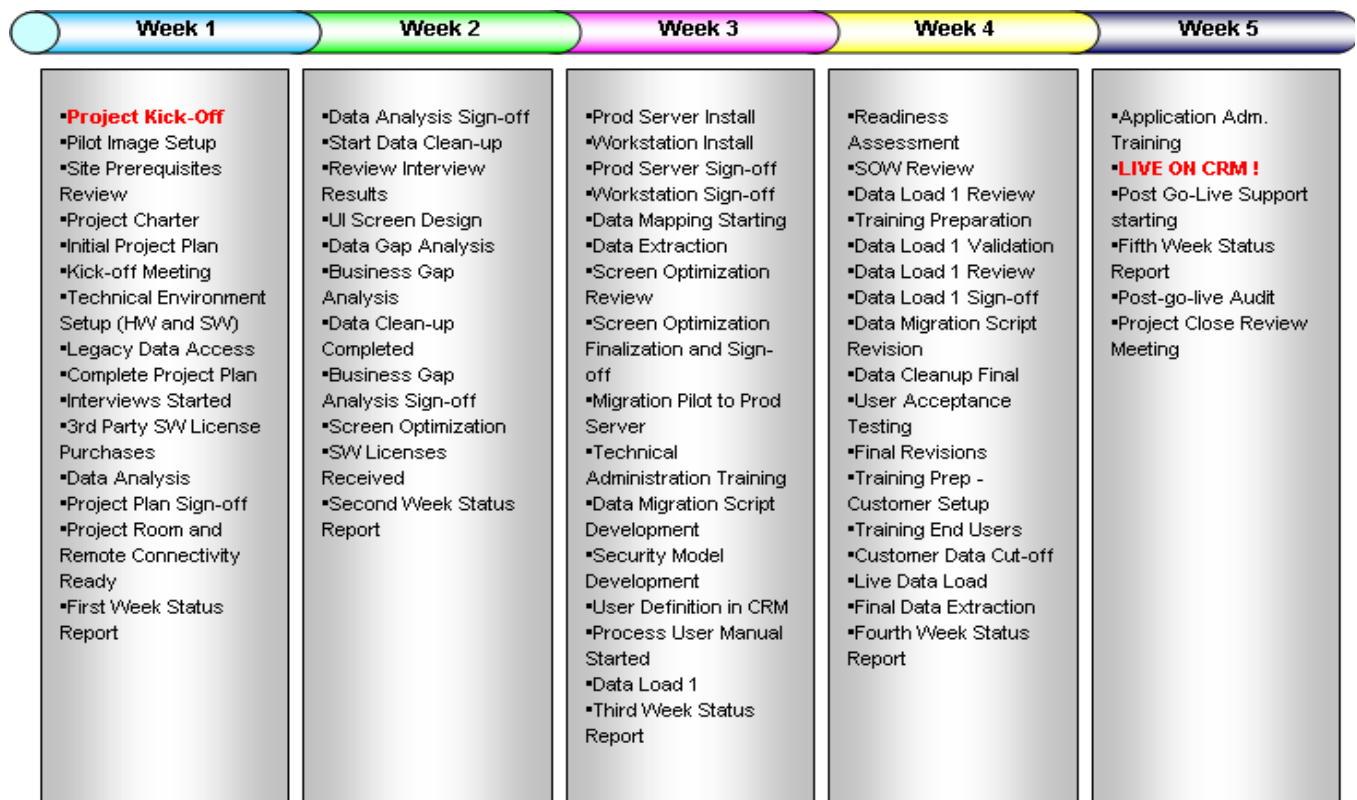
of activities that are clearly understood by the implementation team, and can be planned for with respect to resource allocations and required milestones.

Table 2 sets out the major project phases of the implementation process.

One of the key documents and communication vehicles for the project is the **Project Charter**, defined during the Envision phase of the implementation. The Project Charter is a document that formally establishes the key characteristics of the CRM implementation, providing a framework or direction for the project. The Charter continues to be the common reference point for the organization, throughout the project, for communicating the key business objectives and established project boundaries. Development of the Project Charter depends, to a large degree, on the supporting analysis completed during the early discovery meetings. The major elements of the Project Charter are:

- Project Objective
- Scope Statement
- Project Success Criteria
- Major Project Milestones
- Key Assumptions
- Critical Success Factors
- Communication Planning
- Project Charter Amendments

Subsequent CRM implementation phases that will expand on the systems functionality, integration, or reporting capabilities, are highlighted in the Charter. The Charter assists the change process by setting clear



**Figure 3. - 30 Day Implementation Activity Timeline**

expectations and boundaries for the project.

To ensure the rapid implementation's target duration of 30 days or less is achieved, there are many tasks that need to be scheduled and completed. The key tasks for the 30 day implementation are displayed in Figure 3 above.

Providing the implementation team with a clear list of tasks and deliverables ensures that team members understand their responsibilities, and the time and deliverable commitments for this project. Project control within the rapid implementation timeframe is critical, as little slack time exists to absorb delays in deliverables. Daily project progress reviews must be completed by the project leader, with potential issues and barriers removed as quickly as possible. Weekly (if not more frequent) project status reports to the executive sponsors must be realistic, highlight any major concerns and be action oriented, eliciting additional support and commitments as required from the senior management team.

Providing for remote connectivity (for your team and for the implementation partner) allows continuous work to be done on the project and removes time and travel as barriers to delaying the project. This is particularly important with respect to data migration tasks that may require access to legacy data sources.

## Change Management

There are many versions of the Change Curve (Figure 4) published, but from an implementation perspective, the most important concept is that of disruption

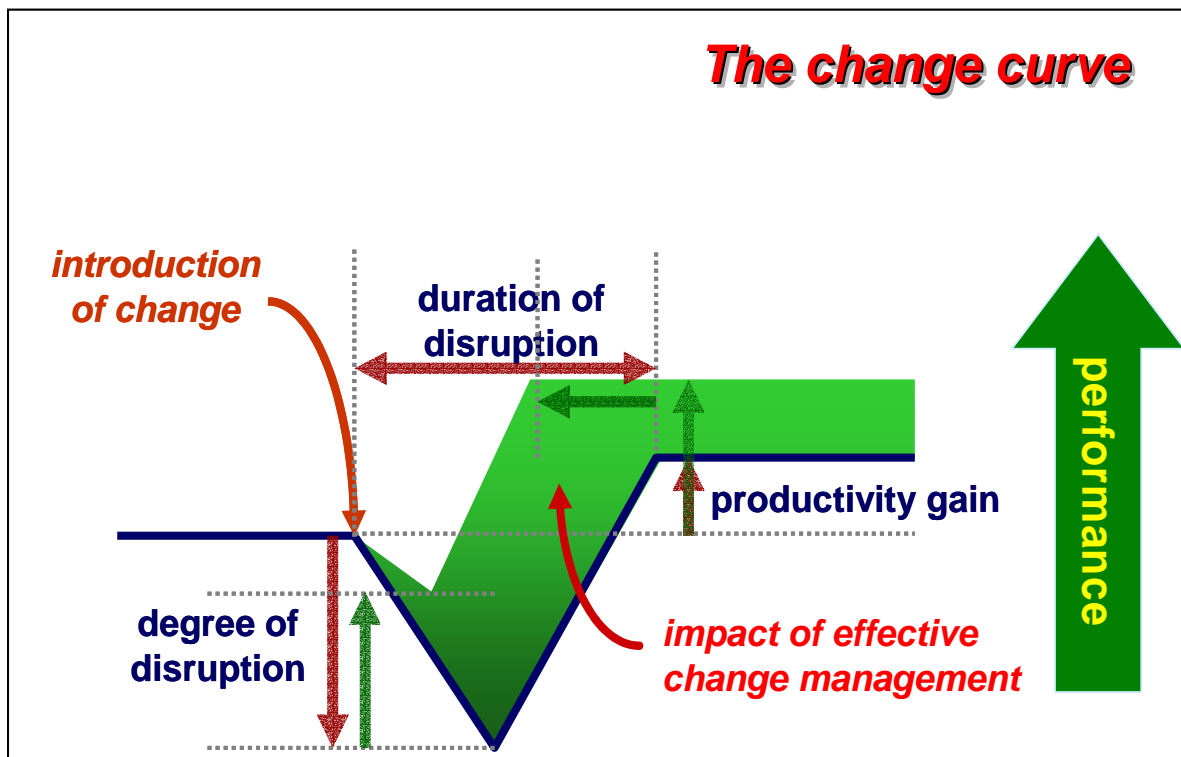


Figure 4. - The Change Curve

to the organization. Disruption to the organization is a natural phenomenon of any change and it begins when the change is introduced. The critical measures of the disruption are the degree of the disruption, for example, how intrusive is this change to the organization, and, the duration of the disruption. Both of these measures are directly proportional to the scope of the project. The rapid implementation methodology is designed to minimize both the duration and the degree of disruption by focusing the CRM implementation on core CRM functionality while still meeting a basic set of business requirements. As demonstrated in Figure 4, the impact of limiting the disruption by effective change management, or in other words, scope management, is that the organization benefits from the change and achieves higher productivity gains earlier.

Change or scope management within the rapid implementation methodology relies on the phase or building block approach to meeting the organization's long term vision. The initial implementation, typically sales and opportunity management, is followed by subsequent phases, each building upon the prior phases, as well as the knowledge, expertise and creativity of CRM users. The underlying assumption of this approach is that the software has additional functionality available, but most importantly, has the flexibility to easily change and expand as the business model and requirements change and expand. Accordingly, decisions made in phase 1 are not set in stone, and do not become limiting factors to future growth. The flexibility of Microsoft CRM ensures this future growth and change. Examples of this flexibility include using Microsoft CRM's capability of entity customization (forms, fields, entities, etc.) (without programming), as well as the development of workflow scripts or integration and expandability with the Software Development Kit (SDK).

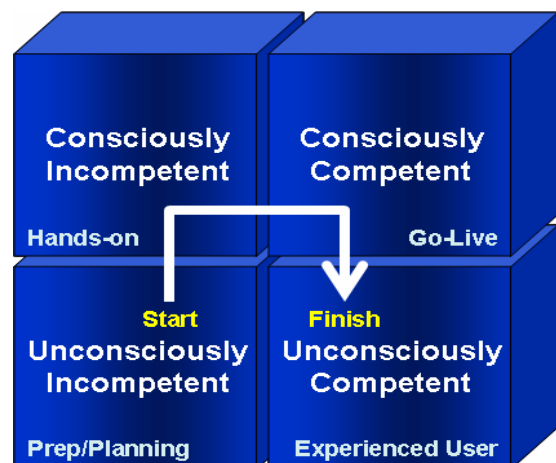
## Lessons on Adult Learning

Effective education of the implementation team and the organization is the final and perhaps most important consideration. By driving them to use and experience the software early in the project and by limiting the scope of the initial phase, the rapid implementation methodology supports two key principles of adult learning.

1. Experiential Learning - Adults want learning to utilize their personal knowledge/skill and experience. Adult learners expect to:
  - a. relate to current issues, real problems
  - b. participate actively and collaboratively
  - c. learn by doing and debating
  - d. apply learning immediately
2. Retention Limits - There are normal limits to the amount of material that can be absorbed and retained at any one time.

### ***Experiential Learning***

Being hands-on with the software as quickly as possible enables the



**Figure 5. – Learning Cycle**

organization to move quickly beyond the initial perceptions and suppositions of the system's capabilities to how the software really works for the customer. Until this happens, the organization is in a state of unconscious-incompetence in relation to the new system (see Figure 5 - Learning Cycle). In other words, they simply don't know if their assumptions on designs and processes will be valid.

Experiential learning forces the team to the next stage of the learning cycle where they first become aware of what they don't understand (conscious-incompetence.) Being hands-on at this stage, they can draw upon their own skills and experience to test and design the use of the CRM system within the context of their business requirements. Without this approach, validation of new processes is difficult. Effective system use at the time of the "go-live" event is supported by the continued system testing and exposure so that as the team and the organization moves to the 4<sup>th</sup> learning quadrant, unconsciously competent, the use of the system has become second nature to them.

### ***Retention Limits***

By narrowing the scope of the first phase of the CRM implementation and repeating the key concepts throughout the implementation cycle, the rapid implementation methodology has already negated one challenge of adult learners, retention limits. The rapid implementation method limits the volume of material to what is really important to get started. This of course leads to the second aspect of retention, which is the reinforcement of new learning.

The average retention rate for adult learners is:

- 50% immediately after,
- 25% within 3 hours, and
- 10% after 3 days.

Reinforcement of new knowledge is essential to long term retention. To accomplish this, it is necessary to schedule "mini-pilots" of the system at the end of every day during the implementation. The objective for each mini-pilot is to exercise the knowledge gained during the day by working through or testing new processes. Each mini-pilot builds upon the knowledge gained from the previous day, such that by the time the organization is ready to perform the formal User Acceptance Tests, the full suite of new processes has already been piloted and understood.

## **What Customers Say**

### ***Launch Pad Marketing***

"We can't begin to thank your team enough, specifically Jennifer, Steve and Adriana for their commitment, and dedication to implementing the new Microsoft CRM 3.0 in 6 days. Your team went way over the top for us so that our business would not be interrupted."

-- Deborah Salsberg --

### **CIMTEK**

"When we started this project we imposed a tight timeline in order to deliver a high user acceptance level which drives the sales forecast report. Vox was able to meet the challenge and demonstrate their experience and excellence in CRM implementations."

-- Karen Bramer --

### **Benjamin Moore**

"We came to VOX Wireless with the challenge of implementing Microsoft CRM for our Customer Service and Painting & Decorating Group. We had a very tight timeline in which to complete the integration. VOX's 30-Day Implementation was what we needed to get "Live" fast."

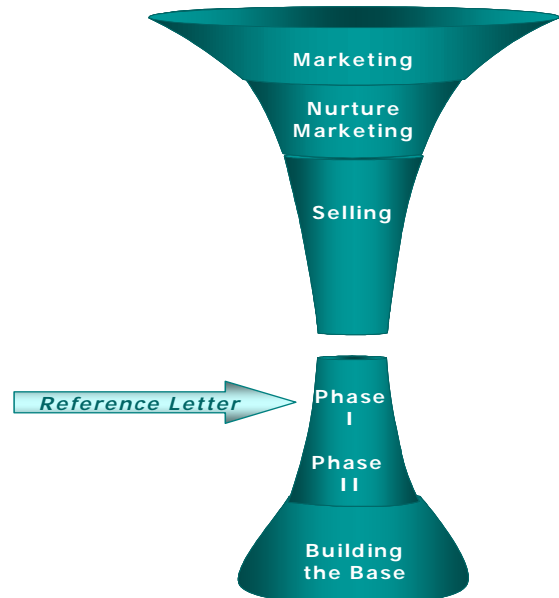
-- Nathalie Doré -

## **What to Expect from Your Partner**

With the Microsoft CRM Rapid Implementation, your implementation partner has the following objectives, consistent with its business model (Figure 6):

- Phase I - Get the CRM system "live", using the key components of CRM productively in 30 days or less
- Ensure that the customer is happy with the implementation, and are referenceable.
- Assist in establishing a Phase II plan to take further advantage of the CRM system.
- Establishing a long term working relationship that supports your continued, effective and expanded use of CRM.

Working with an implementation partner that works within this type of business model, ensures that they are equally interested in the success of your implementation, and ensures your long term success with the software.



**Figure 6. - Partner Business Model**

## Summary

A rapid CRM implementation requires both structure, and, an action oriented mindset that incorporate three concepts:

1. Sound Methodology - removes potential barriers that may delay both the start of the project and more importantly, the ability for hands-on use of the software, and, establishes a structured, planned timeline that describes in detail the steps to completion, the resource (team) demands and deliverables.
2. Change Management - minimize the scope of work to be achieved, while still providing value and a sound foundation for further expansion.
3. Effective Adult Training - ensure that the experience and skills of team members are drawn upon early, with direct system exposure, and, that key concepts and processes are practiced daily for long term retention.

***Implementing CRM in 30 days or less is not only achievable but preferable. Organizations get an earlier return on their investment, experience quicker and higher sales force adoption rates, and, are in a better position to understand how future expansion of their CRM use can further benefit their company.***

## About The Author

**Jeff Porter, Technology and Process Manager, Vox Wireless**

Jeff Porter has over 25 years of experience in information technology and has served as an Applications Consultant, Implementations Manager and now, Technology and Process Manager, since joining Vox Wireless in 2002. Prior to joining Vox Wireless, Jeff was the Regional IT Leader for several of Tower Automotive's locations in Canada and the US, was Vice President, Management Information Systems for Algoods Inc., and spent several years with Alcan Aluminium Ltd. in IT management and applications development. Much of Jeff's focus during his career has been on project management, process development and providing leadership and direction in the implementation of information systems.

Jeff holds a bachelor's degree from the University of Guelph and an MBA from the Schulich School of Business, both in Ontario, Canada.

## About Vox Wireless

Vox Wireless is a Microsoft Dynamics CRM Business Partner serving the Canadian business market, with offices in Toronto, Ottawa, Montreal, Calgary and Vancouver. As a Microsoft value-added reseller of Microsoft CRM, Vox Wireless is noted for its

"Fixed Price, Fixed Scope Implementation Methodology" and "Instant On" commitment to customer service and customer satisfaction.

Vox Wireless was named "Outstanding New Partner of the Year" for 2005 by Microsoft at the annual Microsoft Business Solutions Business Partner Conference. In 2005 Vox Wireless was also selected to work with Microsoft's CRM product group in Redmond on both the implementation methods and materials, and the partner marketing materials for the Microsoft CRM 3.0 release. Vox Wireless has been consistently ranked the number one reseller of Microsoft CRM in Canada and has been recognized as one of North America's fastest growing technology companies in Forbes, Profit 100, Deloitte Touche's Fast 50 and 500 and Start Magazine. (Additional information at <<http://www.voxwireless.com>>)

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

U.S. and Canada Toll Free 1-888-477-7989  
Worldwide +1-701-281-6500  
[www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

The information contained in this document represents the current view of Microsoft Corporation on the issues discussed as of the date of publication. Because Microsoft must respond to changing market conditions, this document should not be interpreted to be a commitment on the part of Microsoft, and Microsoft cannot guarantee the accuracy of any information presented after the date of publication.

This White Paper is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED, OR STATUTORY, AS TO THE INFORMATION IN THIS DOCUMENT.

Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Microsoft Corporation.

Microsoft may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from Microsoft, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

© 2006 Microsoft Corporation. All rights reserved.

Microsoft, the Microsoft Dynamics Logo, [list all other trademarked MS product names cited in the document, in alphabetical order], BizTalk, Dexterity, FRx, Microsoft Dynamics, SharePoint, Visual Basic, Visual C++, Visual

**Microsoft**