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CASE STUDY #1	
SCENARIO BACKGROUND	<ul style="list-style-type: none">• This case study centers on a \$234k project to deliver a Customer Relationship Management (CRM) solution by the vendor V4 Corporation and its internal professional services team. The anticipated project margin is about 43%.• The V4 implementation methodology has five stages after the sales process has closed. Kickoff, Scoping & Design, Building, Testing, Launch.• The customer is C&C Incorporated. A firm that manufactures medical devices for hospitals and employs 1,000 people across 3 operating divisions in the Midwest of the United States.

C&C Incorporated consists of 3 separately acquired operating divisions with approximately 300+ employees per division. Each division has its own sales, services, accounting, legal and HR functions. Corporate C&C consisted of a small executive team which oversaw strategy, consolidated financial reporting, and established basic company policies and practices, such as ordering procedures and financial reporting. A newly formed Corporate IT team was also emerging from the corporate division to help the company find ways to automate and streamline processes and spending. C&C has been in business for more than 50 years and is in the process of transforming its company from a traditional manufacturing environment to a modern world class organization.

C&C's executives had identified that the company's inability to operate as one entity in front of the customer was costing them sales against bigger and more organized competitors. Their board agreed that resolving this issue was one of the company's top priorities for this fiscal year. The C&C corporate team chose the **CRM Magic** product from **V4** during a competitive tender process focused on reducing their overall operating costs, standardizing and streamlining sales and achieving a higher level of cross-selling between divisions. C&C selected V4 CRM Magic because they felt it had most of the features they wanted straight out of the box. The launch date for the new solution was scheduled to coincide with C&C's sales kickoff event in February of the new year and the date could not be missed.

Michael Williams had just been hired as C&C corporate's first corporate-wide Sales Operations Manager. Although C&C corporate didn't have its own sales division, Michael's role was to streamline the selling process across all divisions and report directly into C&C's Chief Operating Operator. Michael was hired by C&C because of his 25 years of experience in sales and sales operations. Though Michael had experience implementing new software solutions, this would be his first time implementing a multi-divisional solution and his first experience with V4 CRM Magic. Michael did not participate in the RFP process and was assigned to oversee the project after V4 Corporation and C&C signed the contract and SOW. Michael was unaware of any of the final SOW negotiations but did sit through a few of the V4 demonstration meetings that were recorded as a part of the process. Michael had 25% of his time assigned to project managing the V4 CRM Magic implementation. The C&C staffing plan required that each operating divisions provide additional FTE resources to assist with discovery, testing, and roll-out. In addition to being the V4 CRM Magic project manager, Michael had to fulfill his day-to-day responsibilities.

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Jenny Wells is a V4 Solution Architect with more than four years' experience implementing V4 CRM Magic. Jenny is the person primarily responsible for the solution's overall design, stability and performance. Jenny joined V4 as an associate implementation consultant after graduating from university. During her time at V4, she had learned how to deliver complex workflow approvals, complex account hierarchy customizations and third party integrations. Jenny has strong technical skills and prides herself in being able to determine how V4 CRM Magic can be configured to support unique client requirements. Jenny has always managed a heavy workload. In addition to putting in extra hours on client projects, she also routinely worked extra hours to brainstorm and answer product questions from other implementation consultants.

Similar to other projects, Jenny received some detail via email from the sales executive who closed the deal and the pre-sales solution consultant. During the project kickoff Jenny provided an overview of the implementation methodology, the expectations on both the customer and the implementation teams and the high level project plan. Jenny and her V4 Project Manager delivered the project kickoff at C&C's corporate headquarters. Michael attended along with some other subject matter experts from the separate divisions. The COO did not attend.

Some minor requirements were uncovered during discovery, but Jenny believed that they could easily be accommodated within the existing timeline. As Jenny did not want to create any friction with the customer in the early stages of the project she thought it best not to raise these directly with the customer.

During the Scoping Stage, Jenny wanted to engage C&C's SMEs from each division during Scoping, but Michael said that it would be faster and more efficient for him to gather the requirements for the various divisions, and then share them with Jenny. This approach sounded risky to Jenny but Michael's confidence made her think that he could handle it so she said nothing to try and change his mind.

Michael was soon having a difficult time gaining support from some of the operating divisions. When the divisions failed to deliver to a specific request for information on time, Michael would get stressed and request that V4 Corporation "do the right thing" and help him chase down his colleagues to make sure they provided the right information. Although Michael reported some of the project's issues to his COO he seemed to always play down their severity.

Two weeks into the project, signs of significant delays began to surface. A day before Michael was due to return the Scoping Workbooks (a template the customer completed to help V4 understand how their accounts, contacts, opportunities and deals were structured), he called Jenny asking for an extension of several days, stating "I need to track down a few items". Knowing how busy Michael was with the project and that she herself had some other projects escalating at that time, Jenny gave him another week to complete the document. About a week later, Michael still didn't have the document completed. He did manage to complete the Scoping Workbook for 2 of the operating divisions, and partially complete the 3rd. Michael commented that it was very difficult to gain access to the SMEs. After reviewing the first 2 division's Scoping Workbooks, Jenny noticed that the variations between divisions

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were minor so assumed that the third would be similar. Jenny decided to move forward with the design phase of the solution, confident that she had enough of a complete picture and could fill in any missing requirements along the way. For two weeks she pieced together the information provided by the two divisions and completed a comprehensive design. The 3rd division's Scoping Workbook still wasn't in and she escalated this to the project team and was told that it would be delivered shortly. Because of the tight timeline and need to be ready for the Sales Kickoff event, the project moved into its build phase one week later than it had planned to.

Jenny began configuring the solution just as the 3rd division's Scoping Workbook was delivered. It did not appear to be substantially different from the first two and in fact was far more detailed. Jenny started to put in the extra hours in order to make up for the time lost waiting for the workbooks.

The build out of the solution was taking longer than expected because the first two divisions had not completely understood the workbooks and not completed all of the necessary information accurately. Every time Jenny provided the combined teams with a preview of her work, one of the first two divisions would identify a new requirement that did not align with any of the other divisions. This meant a lot of rework.

Originally, the project had specified a 3 week build process, but Jenny worked tirelessly over that period but it still took 5 weeks to get the first version of the solution, ready for testing.

Jenny migrated the solution into the testing environment, albeit 3 weeks later than originally planned. The Testing Stage was originally planned to be 5 weeks long. Jenny explained to Michael that it was not possible for his team to completely test the solution in 2 weeks, but Michael assured her that he had added an additional member to the testing team to make sure they caught up with the original schedule and had the solution ready by the Sales kickoff. Jenny and her Project Manager believed that Michael was committed to making up the testing time and moved ahead.

Michael's team began to test the solution by running through batches of test cases. The first batch of tests was not going well. The C&C testers had not sat on any of Jenny's walkthrough sessions and had never been exposed to the solution. As a result, testing was slow because the team kept asking a lot of basic questions. Michael had also let each team member focus solely on their own division's functionality which meant that all three divisions were testing different functionality at the same time and in different ways. Jenny and her team were receiving a high number of errors. The high number of reported errors discouraged the testing team and they started to claim that the whole solution had been a "waste of time". The three teams were also testing at different rates of progress. The testing team was getting increasingly upset as they also had to do their "day jobs" and the lack of progress in testing the solution was becoming a burden for them.

Not all of the errors raised by the testers were legitimate coding errors. However, about 20% of them were issues dealing with a specific part of the sales process that was not completely specified in the design. Furthermore, the two divisions (that had completed their Scoping Workbooks on time) were

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raising about twice as many errors as the other division that had handed theirs in late. When Jenny looked at these issues from a solution design perspective she realized that the V4 CRM Magic could manage them fairly easily if the three divisions could simplify one of their business processes so that it was similar (but not exactly the same) across the three divisions. Michael was not open to that, and suggested that Jenny “figure out a way to get it done” in a manner that supported the three teams separately.

After 3 weeks of testing and another week’s slippage (the project is now 4 weeks behind schedule), Michael was very upset and knew that time was running out to make the Sales Kickoff deadline. The Launch phase had planned three weeks to go live and so he made requests that the V4 Corporation bring on additional staff to make the deadline in 2 weeks’ time. Jenny and her Project Manager discussed this request and knowing that they had no more staff to bring on to the project and they decided to rejected this request. Jenny sent Michael an email explaining their decisions and reminded him that she had told him not to take on such an aggressive testing schedule and copied his manager.

At this stage Michael sent a notification to his executive sponsor (the COO) that the project would now miss the Sales Kickoff launch deadline because of the high number of errors being found during testing. This caused major escalations within the customer’s executive ranks. They in turn escalated the issue to Jenny’s Project Manager, Jill Jennings, and her manager (the head of V4 Professional Services). V4 agreed to build out an additional set of screen shots and simulations for use at the SKO launch event at its own expense. This delayed the project another week in order to create the unplanned materials.

Jenny was becoming frustrated by her experience with C&C and complained to Jill (the V4 Project Manager) that despite her efforts, the customer’s testers would not stop shifting the solution’s requirements and that she needed help. She still felt that a big part of her troubles could be resolved if the customer would accept the change in business process that she had recommended. Jill Jennings called Michael and asked for a meeting with he and his executive sponsor, the COO. After much discussion Jill convinced the COO to accept the change in business process that Jenny had recommended. The COO agreed that while the new process was not what the divisions wanted, it was actually more aligned with what the corporate division was trying to achieve with the project.

Jenny put in another 3 weeks of long hours averaging 75 hours a week. She managed to correct the issues being raised by the testers and added in a few parts of the additional functionality the testers had requested. Finally, all of the test cases being ran by the testing team were able to run successfully and achieve the desired results.

As a part of the Launch Stage kickoff, the executive steering committee for C&C were asked to review the solution. Jenny sat in on the meeting and was excited for the C&C executives to see the final product. To her surprise some executives argued that the solutions usability was poor and they believed that launching the solution would cause confusion. Other executives argued that the solution was already going to be 5 weeks overdue and that something had to be launched in order to not lose

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credibility with the Sales team who were already starting to hear rumors about the solution not being ready or even stable.

Eventually C&C requested that the solution be pushed into the live environment at the end of the planned 3 weeks of launch activities and asked that V4 immediately begin a set of remediation activities focused on fixing the usability and performance issues. C&C requested that the fixes be installed into production no later than 4 weeks after the solutions initial launch.

The solution was launched into production and V4 agreed to do another 3 weeks of additional clean up on the user interface and performance issues free of charge. When these enhancements were also migrated to live the customer executives were happier with the solution quality and they signed off on the project's completion.

The project was finally delivered a total 8 weeks late. 6 of those weeks were funded solely by V4 and the other 2 were paid for by C&C at a reduced billable rate. The project made an 8.5% profit margin once it was completed. As a part of the project wrap-up both Michael and his executive team rated the V4 CRM Magic implementation project a 4 out of 10 and said that they would not recommend V4's professional services to any one and they would not act as a reference.