

## ADVANCED Timeline of activities to be completed during CRM migration / implementation

PHASE 1 Needs Analysis+ Planning	PHASE 2 Investigation	PHASE 3 Tools & Partner Selection - Pilot Planning	PHASE 4 Pilot & Tuning	PHASE 5 Roll-out & Fine-tuning
As Is To Be assessment completed				
Stakeholder identification & assign roles / involvement levels	Communicate the change to stakeholders - Why exactly are we moving CRM?			
Map out current use of existing CRM (E.g. workflows, custom properties, calculated fields)	Formulate ideal sales process and map to CRM capability	Fine tune the new "to be" sales process	Test out the new "to be" sales process	Implement new "to be" sales process
Map out the full calender timeline from day 1 of migration to full roll-out complete				
Research CRM platforms - See demos of systems	Shortlist software vendors	Select CRM vendor and agree commercials	Complete contracts with chosen CRM vendor	Assign all applicable CRM licenses to users
Analyse current data - volume/depth	Identify problematic data exports from current CRM	Map out old to new CRM data points for migration	Scale back usage of old CRM	Close down old CRM
Plan CRM Migration Budget	Get full budget approval			
Understand whether 3rd party assistance is needed		Identify proof goals & success measures for a pilot	Build dashboard of key activities to measure pilot activity	Report on KPI's of sales process
	Identify pilot groups	Identify super-users of new system	Run pilot with first group of reps+ super users	Roll-out to all sales reps
		Data back-up	Training with pilot group	Create playbooks for all Sales to follow
			Document any difficulties arising from the pilot	Iron out any difficulties arising from the pilot
			Carry out in-person/online survey of reps on new tool	
			Aggregate feedback from reps	Document aggregated time-savings & calculate ROI