CRM Workshop & Scoping Meeting Agenda

This document is a guideline agenda for gathering of information in relation to a proposed *Customer Relationship Management* (CRM) implementation within your organisation. The information gathered is then used in preparation of the "***Functional System Design"*** document forms the "Road Map" to a successful CRM project.

Who Should Attend:

Managing Director, Sales and Marketing Directors, Sales and Marketing Managers, together with Key users such as Field Sales, Marketing team as well as your Sales Administrators and Service and Customer Support personnel should attend at least for part of the day and during the initial briefing and kick off session.

However any personnel directly involved with the use of the CRM system should also be considered. Also required is an input from in-house or external IT personnel. Meetings typically start around 930 to 10am to enable staff to clear their 'inboxes' and delegate tasks before the meeting.

Meeting Duration:

A Workshop scoping meeting will take from ½ day to 1 day depending on the complexity of the proposed system. Sometimes, follow-up meetings are required, but we try to cover the subject in one long day. Personnel providing information do not have to be present for the entire duration of the meeting but obviously they would be required when discussing topics with relevance to them.

During the meeting the chosen Product will often be referred to explain areas – sometimes this is a refresher in the CRM's functionality (if required and chosen).

The final Hour will be spent reviewing Day and a Discussion on proposed Implementation Schedule and Project Plan together with a Road Map of Phases.

Key Topics

The following is a list of typical topics discussed with a brief description where applicable:

- Scope of Project and Rationale

- Client Specific requirements by Team (discussion and discovery of roles/processes for each team and internal terminology used). This will typically take the majority of the time. So this may be divided into team areas with the Project Sponsor present throughout the day:-
    - Record Definitions (e.g. Company or Account, Person or contact etc)
    - Sales (e.g. Opportunities (Stages), Lead to Prospect to Client, Reports)
    - Marketing (e.g. Segmentation and Profile Targeting, Email and campaigns)
    - Customer Service or Post Sales (e.g. Account Management, Contracts etc)
    - Service or Helpdesk (Cases or Tickets or Complaints/Asset Registers)
    - Email Marketing and Social Media integrations (if Required)

The above areas often focus around important screen design and layout requirements – looking at the areas of customisation & user defined fields for each area. Other areas include:-

- Process Workflows and Notifications improvements or opportunities (e.g. how to automate or semi-automate processes to save time and effort).

- Management Needs and Reporting Requirements and existing Reports

- User List & teams/Territories and Security profiling (e.g. who can do what)

- Data Import and Migration– analysis of existing data sources to be imported

- Integration Requirements– with MS Outlook, MS Word, Excel

- Integration requirements with Other Systems (e.g. ERP, Email Marketing, Social Media)

- 3rd Party Add-on – any additional functionality as provided by 3rd party vendor software. E.g. Postcode software, Import utility software

- Current IT Infrastructure – with the help of IT Staff.

- Training Requirements and Plans (numbers, approach such as 'Train the Trainer", venues and facilities together with *User Acceptance Testing* needs).