

EXPRESS Timeline of activities to be completed during CRM Implementation

PHASE 1 Planning & Research	PHASE 2 Tools & Partner Selection - Pilot Planning	PHASE 3 Pilot & Tuning
As Is To Be assessment completed		
Stakeholder identification & assign roles / involvement levels	Communicate the change to stakeholders - Why exactly are we moving CRM?	
Formulate ideal sales process	Test out the new "to be" sales process	Standardise the new sales process
Understand whether 3rd party assistance is needed		
Research CRM platforms & shortlist software vendors	Select CRM vendor and agree commercials	Complete contracts with chosen CRM vendor
Plan CRM migration budget	Get full budget approval	Roll-out licenses to all sales reps
Identify pilot groups + super-users of new system	Identify proof goals & success measures for a pilot Pilot with first group of reps+ super users	
	Build dashboard of key activities to measure pilot activity	Report on KPI's of sales process
	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