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Is Your CRM Implementation Architecture or Interior Design?

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I've recently done some serious house construction projects, both remodeling and ground-up building. Like any good engineer, I have no problem working with the architect, the civil engineer, the construction guys and even the inspector. I might object to the total bill, but I can understand all the components and cost drivers.

Interior designers, however, drive me nuts. As far as I'm concerned, they might as well be Feng Shui witch-doctors. While individual interior designers clearly have their own methods, if you compare them, there seems to be almost no consistency in the inputs, outputs or sequence of actions. In other words, they don't follow a business process. In the immortal words of W. Edwards Deming, "If you can't describe what you're doing as a process, you don't know what you're doing."

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When it comes to costs, interior designers just don't seem to understand the meaning of the word "budget." They never see an overrun that they don't like, endlessly pointing to wondrous things that would make the Sultan of Brunei blush — and you just know that, 18 months from now, you'll have to throw much of it away when it's hopelessly "out of style." You'll be endlessly replacing all those Great Ideas.

CRM More Drapery and Duvets Than Ducts and Dormers

Uh-oh. I just realized I'm an interior designer.

Not really, of course. But looking at CRM implementation from the client's perspective, I see too many eerie parallels:

- CRM requirements seem to vacillate and be totally subjective. There are no specs, just "stories" under the influence of users emotions. What's important this week? Only the users know. What'll be important next month? We'll just have to see. Worse still, all the details of what's being delivered are hammered out in real-time, below the radar of accountability.
- Even if every sprint completes on schedule and on budget, the client doesn't know exactly what it's going to get in any one sprint. All it gets is the vague idea that each release train will have "the most important things for the business that can be delivered with quality." Inmates run the asylum.
- In a most uncomfortable way, there's no way to know when the CRM system will be done, so it can be frozen into a production configuration for a couple of years. Instead, the only assurance you get is that the business requirements will continue to evolve, so the system will be in a state of continuous overhaul until the day it's decommissioned. Guaranteed lifetime employment for

your CRM consultants.

- Due to that continuous evolution of your systems and integrations, there's anything but a guarantee of data quality. Without continuous attention from people and process designers, CRM data tends to degrade faster than any other database. In some industries, the email field alone can degrade as much as 10 percent per month. Plus, your CRM may hold the enterprise's most expensive data in the first place. This is like cleaning luxurious silk drapes every time you want to use them.
- Financial and operational professionals want a set of specs, a systematic project plan and a spend plan that they can examine and compare against reality throughout the life of the project. Instead, agile teams look like artist colonies, with ephemeral "card walls" and plans that don't seem to extend beyond the current week. There's only the assurance that money will be spent, not that you'll get anything for it. Understanding what the scrum team is up to requires too much attention and careful listening, and even then the team may seem evasive.

Agile: The Antidote to Interior Design

The first step toward sanity is as simple as it is difficult: Put the best people you can on the agile team. In particular, the scrum master and business champion need to be seriously smart, energetic and committed. Great agile projects never involve wannabes.

[Analysis: CRM Implementation Needs Training Wheels, Not Racing Gear]
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The next step is to focus the team on functionality, not looks. I've seen a one-page report turn into a $20,000 exercise, as users focus on formatting rather than information value. They didn't even notice that the contents were incorrect until after the budget was gone. This goes double if you're trying to output CRM data into PowerPoint or Word. Any time you hear the phrase, "it needs to be pretty," just think, "pretty expensive."

Then, get Agile metrics in place. As I mentioned in a prior article, there are ways to make Agile projects measurable. Since this is the first step to manageability, start using those metrics.

Since I wrote that article in April 2013, agile tools have gotten better, particularly in creating crossover measurements that make sense to the non-agile manager. So the next step is to get these crossover tools, as they make it realistic to provide story burn-down rates to match budgetary consumption and elapsed timeline.

Dont take the metric "translation" too seriously, though, as stories rarely have a linear relationship to milestones or true completion. Of course, all this is subject to interpretation and gaming — but it's not like waterfall projects are impervious to those problems.

The strategic antidote, though, is tougher. Stay away from "deliverables," as that puts you in pure bean-counter mode. Instead, agile leadership must create a roadmap of strategic goals for the overall business process evolution — with the roadmap focusing on the sequence of completion, not the exact timing.

Even as stories are added and requirements change, you can still show "thermometer indicators" that measure a goals' progress. If management prefers red/yellow/green traffic-light indicators, that's OK for periodic status reviews. But the thermometer scales better indicate how far you've progressed in your big-picture organizational and IT journey.

David Taber is the author of the Prentice Hall book, Salesforce.com Secrets of Success, now in its second edition, and is the CEO of SalesLogistix, a certified Salesforce.com consultancy focused on business process improvement through use of CRM systems. SalesLogistix clients are in North America, Europe, Israel and India. Taber has more than 25 years of experience in high tech, including 10 years at the VP level or above.

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