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Why Your CRM Integration Consultant Doesn't Know Anything

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Software implementation consultants have been around for more than 30 years. By now, virtually everyone has a cloud practice—even firms that have simply transitioned their SOA practice into the hotter market. Of course, there are new cloud consultancies, but most tend to follow the same mold.

The economics of software implementation consultancies haven't changed much either over the last decade or so. Almost everyone follows the pyramid model with some or all of the following traits:

- The partners at the top typically have significant business experience and domain knowledge in a couple vertical industries. You'll see them mainly in the sales cycle, though, so their experience is rarely available to your project. As rainmakers and practice leads, they are not billed for that many hours on client work. Their time is too valuable, and most clients wouldn't want to spend the $300 to $500 an hour they charge.
- Your project team's most senior members will likely be business analysts. They'll be pretty good at business process analysis, and they might have some expertise in your industry, but it is extremely rare for them to have serious operating experience inside business units or executive experience. Their recommended best practices, then, might be something they've seen, but not actually lived or run.
- Your team's project lead is typically very good at project management, but his or her domain knowledge is typically focused on managing fixed-price consulting projects . This a very different set of issues than your business faces—unless, of course, you run a consulting business.
- Finally, the development staff and technical specialists are all too often offshore. Does this lower the cost? Sure. Does it make business sense? No way. Even if the staff has had some business school training, the business sense that's been developed is in a very different context from the U.S. market (or whatever market you are in).

Don't Automate Outdated Ideas

There's another issue in this discussion I can't skip—your behavior as a buyer of integration services. By focusing the bid on fixed price, you've instructed the integrator to focus its energy and skill on lowering cost and risk. You've said, "Just get the job done," not, "Get me domain experts who can help ensure that I've asked for the right thing."

Is there any wonder the integrator can't focus on delivering business value? I won't beat this one to death, but, simply put, you can't change the integrator's behaviors unless you change some of the choices you make as a buyer.

The state of the CRM integration market, as a result, is surprisingly uniform. Each vendor has better or worse technical capabilities, but it's very rare for the consultancies to have business savvy and really deliver business value. This is problematic; CRM systems are supposed to optimize business

processes, not just automate outmoded ideas.

As I've written endlessly, CRM systems are inherently political, more so than all other enterprise systems. The "soft issues" can be way more important than the engineering stuff.

4 Things to Look For in a CRM Consultant

How do you make sure that the integration consultant you are using has the industry experience and business savvy to help you implement the *right* CRM business processes—one that spans people, policies, and systems? Here are four things to look for.

- Make sure you know exactly who will be on your implementation team. Don't let the integrator play the "our finest staff" game. Make them name names, show specific resumes and provide guaranteed levels of effort for the key individuals across the life of the project.
- Look at the CVs of the team, as much for their prior industry experience as for their consulting gigs. Titles matter. Look for span-of-control and specific process verbiage in the CV.
- Get references for the key team members. Pay less attention to the references for the overall firm, as they typically have been heavily massaged, if not outright manufactured, to be glowing.
- Don't leave the interviewing and selection of CRM integrators to the purchasing department. It knows how to negotiate price and terms, but it won't have the depth and perspective to detect knowledge about your business issues.

Over the life of the project, you need to make sure you're getting the business value you paid for. Don't fall into old habits of waterfall projects and cost-based metrics. Those can only keep you on schedule and on budget without considering whether you're actually building the right thing. Instead, keep the team focused on optimizing business value and adding its unique knowledge—both technical and business process—to the project.

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