







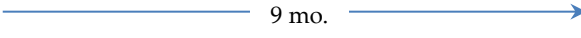


## Tool #23: Example CRM Implementation Timeline

“How long will it take to implement a CRM system?” is one of the basic questions that implementers struggle to answer. Without an answer, they launch an implementation that slowly comes together—squandering the efficiencies of over-lapping processes and losing valuable momentum. The end result is often an implementation that is behind schedule, over budget, and stagnant. Staff are not invested, undercutting future utilization. Without a realistic project outline, an otherwise successful CRM implementation can be labeled a failure because it does not deliver against unachievable expectations.

The Example CRM Implementation Timeline outlines a project plan and corresponding timeline. The estimates below are for a moderate 20-50 user implementation of a standard, mid-market CRM application. Processes and times to completion should be essentially the same regardless of whether the implementation is an “in the cloud” or “on-premise” deployment.

Implementation Step	Duration	Time Course (across calendar year, assuming January start)											
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Requirements Definition	30d												
Vendor Selection	60d												
System Design	30d												
Data Preparation & Cleansing	75d												
Development	20d												
Testing	20d												
Training	20d												
Go-Live Activities	10d												
	265d												

### Top Lessons Learned About CRM Implementation

**Don't Forget About the Front-End Preparation.** The plan above does not include the preliminary feasibility and planning activities that inform the decision to move forward with CRM. The time elapsed while considering whether to undertake a CRM project can dwarf the time it takes to execute once the decision is made. See Tool #19: CRM Business Case Template for decision guidelines for pursuing CRM.

**Note the Importance of Back-End On-Boarding.** The plan also suggests that the project finishes once the live phase is complete. The reality is that there is normally an intensive period of “on-boarding” with new users until the desired usage patterns are established. The plan also assumes all users will go live together, which in practice may not be the case, and on-boarding will need to occur as each group goes live.

**Rushing Early On Will Hurt Later.** In the above plan, estimated development time is less than the time dedicated to other activities, which reflects the flexibility of the current generation of mid-market CRM packages. However, if the requirements-gathering and design phases are not comprehensively and competently completed, the development phase will likely grow significantly.

## Tool #23: Example CRM Implementation Timeline

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**Remain Flexible as Needed to Account for the Unexpected.** While there is a measure of contingency built into the plan above, it still depicts a fairly aggressive timeline, and it doesn't factor in some of the day-to-day business realities that can disrupt projects, such as key staff being unavailable. Additionally, other business priorities can put a project onto the back burner. Absolute fidelity to the timeline above should not be a goal so much as the timeline should set general expectations and trigger planning accordingly.

**Finally, a Few Reasons Why this Timeline May Vary.** Contacts remark that vendors do not always accurately define or communicate how long a CRM project will take to plan and launch. Be it due to a desire to finalize a sale or an underestimate of the magnitude of the implementation, vendors tend to lowball time estimates.

Additionally, varying definitions of what "implementation" includes also contribute to discrepancies in timeline estimates. Quotes of a 12-week roll-out, for example, are almost certainly not referring to a process beginning with initial planning and feasibility studies and ending with satisfactory levels of user adoption. Instead, the estimator probably is including only the phases from development to first-users-going-live. As the timeline above displays, the phases you take into account affect quoted duration of a CRM implementation.