

Tool #28: CRM Resource Intensity Comparison Chart

CRM, though well-established in other industries, is still rather nascent in the postsecondary education space. CRM champions working within continuing and online education units typically bring with them some CRM experience that encourages them to advocate for implementing a system. This experience, however, does not necessarily equip them with an understanding of the funding, staff, and time required for implementation. This information is critical both for making the case for CRM to unit leadership and for accurately budgeting resources.

The CRM Resource Intensity Comparison Chart is informed by interviews with over 100 COE units that went through the implementation process and is designed to help decide between the three levels of customization are appropriate given a unit's goals, budget, and organizational readiness for change.

Factors Informing Investment

- **Complexity of CRM Needs.** The answers to the following questions should allow you to classify your CRM needs into one of the three categories listed below:

- What are your short- and long-term goals for CRM?
- How much customization will your CRM solution require? Will forms, fields, and workflows all need to be configured to meet special requirements or unique business processes?
- Will CRM need to be cross-function, encompassing multiple departments? How many other systems will CRM need to integrate with?

Categories of CRM Needs

- **Basic CRM:** an “out-of-the-box” deployment that will allow you to use the system as-is; a deployment that is contained to one or two units with little-to-no cross-functionality
- **Tailored CRM:** an implementation that will require some customization of forms, fields, and workflows in the system to better align with your organization's processes; will also likely require some customized reporting tools; may involve a small amount of cross-functionality
- **Extended CRM:** an advanced implementation that requires extensive customization, integration, reporting, and cross-functionality

- **CRM Readiness of Organization.** CRM is an intrinsically human-driven set of processes that is supported by technical infrastructure. Therefore, staffs' readiness to adopt CRM is a big X factor when determining the time and resources (both human and financial) the project will require. See Tool #21: Stakeholder Process Improvement Forms for guidance on how to encourage staff buy-in.

Overview of CRM Investment

Your Investment in:	Basic CRM	Tailored CRM	Extended CRM
Estimated Time to Go Live	1-2 months	6-9 months	12 months+
Estimated Services Budget*	\$15-20K	\$25-45K	\$50K
Recommended Human Resources (can be drawn from current staff if expertise is present)	Power user, process expert(s)	System admin., IT staff, process expert(s)	CRM database admin., IT director, process expert(s)

* This does not include cost of the software package, which can vary widely. For more guidance on this topic, see Tool #25: Higher Education CRM Vendor Primer.