Tool #32: CRM Leadership Structure Guide

Knowing which staff members to include in the preparation for CRM is a complex question that many struggle to answer. Poorly staffed projects are more prone to falter at every step along the road to implementation from poorly defined scope, to lackluster end-user buy-in, to reporting on outcomes.

The CRM Leadership Structure Guide[1] describes the important individual roles that must be filled and groups that must be assembled to steward a healthy project through to completion. Though most units probably do not have the resources to staff their implementation with every position described below, they should ensure that all functional capacities are filled; one person can fill multiple roles.

Executive Sponsor

Description: Senior executive, typically the dean or equivalent of the COE unit who is ultimately accountable for the success of the CRM program within the organization. The executive sponsor's frequent, vocal, enthusiastic focus on CRM will communicate to the entire organization that CRM is a part of its "DNA" and that each employee needs to make sure it is given priority. In addition to this evangelism, the executive needs to hold each layer of management accountable for the success of CRM in their departments.

Responsibilities:

- Securing necessary funding for CRM program
- Setting expectations for accountability and downstream reporting
- Setting and maintaining an enthusiastic and supportive tone for the project

Important Qualifications:

- Must be a CRM "believer." This individual's tone, engagement level, and enthusiasm all have an outsized influence on the CRM program.

CRM Program Lead

Description: overall project manager and orchestrator for the CRM program, typically a marketing director or leader. This individual manages the planning, regular maintenance, and enhancement processes and is the most active actor along the path to CRM implementation.

Responsibilities:

- Setting goals for the CRM program
- Being the ultimate decision maker for CRM questions within the organization
- Developing the CRM roadmap
- Creating maintenance and enhancement plans

Important Qualifications:

- Strong project management skills
- Understanding of customer-facing part of the organization and empathy for customer-facing employees
- Ability to communicate comfortably at the executive level
- Experience with managing technology systems, vendors, and software developers

[1] Adapted from: Kostojohn, Scott, Mathew Johnson, and Brian Paulen. "Components of CRM Success." *CRM Fundamentals*. [Berkeley, Calif.]: Apress, 2011.

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Steering Committee

Description: The critical body for guiding the CRM program within the organization.

Important Voices to Include:

1. CRM Program Lead
2. Departmental Champions (representative from all key CRM constituent groups like marketing, recruiting, program administrators, etc.)
3. Representative from IT (less important for a SaaS CRM deployment)
4. Representative from Administration Team (see below)

Responsibilities:

- Managing the ongoing change control process for production CRM applications. This is the formal evaluation and approval process for configuration changes to the CRM application, used once CRM is in production to ensure that proposed changes do not interfere with any group's usage of CRM and that they are aligned with the overall CRM roadmap and to communicate these changes to the various CRM constituencies.
- Developing and maintaining the CRM roadmap for the organization. The roadmap describes the plan for enhancing the CRM program over time and how these enhancements support the organization's strategic goals. The roadmap may describe new capabilities to be added to CRM, new user groups to be migrated to the application, or new business processes to be implemented and supported with CRM.

Important Qualifications for members:

- Can accurately represent the needs of their constituency to the committee
- Can understand how changes to the CRM program will impact their constituency

CRM Vendor Selection Team

Description: The team that will lead the search for a CRM vendor partner.

Responsibilities:

- Assemble a vendor selection scorecard in light of specific CRM needs (see Tools #22: Guide to Understanding Your CRM Needs and #26: Vendor Selection Scorecard for more guidance)
- Assemble the RFP if one is mandated by organizational procurement policies
- Attend vendor meetings and demos
- Check vendor references and make a selection

Important Voices to Include:

1. CRM Program Lead: knows what CRM features are important given specific CRM goals
2. IT Representative: ensures integration and other technology pieces
3. Business Analyst: ensures reporting needs are met

Implementation Team

Description: The group charged with the initial rollout of the CRM program.

Responsibilities:

- Designing an implementation rollout plan
- Ensuring that each user group has an adequately staffed trainer and champion
- Deploying the implementation plan and monitoring for flagging user groups
- Maintaining enthusiasm for implementation by sending reminders, success stories, updates

Key Roles (one individual may play multiple roles):

1. Executive Sponsor: Will want to stay current on the status and progress of the project and assist the implementation team by clearing bureaucratic obstacles and encouraging engagement across the organization.
2. Program Lead: Plans the project, keeps it on schedule, and maintains communication throughout.
3. Subject-Matter Experts: Individuals on the team with a deep understanding of the business area that will be impacted by CRM and will help guide the process design and CRM application design to meet the project goals. It is important that the SMEs understand the situation "on the ground" today (what are the current processes and what tools are being used) as well as the larger pictures—the longer-term organizational vision for CRM in their area and the immediate project goals that help achieve the vision.
4. IT Representative: Responsibilities may include: procuring and maintaining server hardware, initiating integration of other systems with the CRM, updating client machines, assisting the consulting team with network and server access, and potentially doing some development and testing work. For on-premises deployments, the IT representative will also be responsible for disaster recovery planning and application backup.
5. User Trainers: Communicate to users how their work processes are changing as part of the project and how new technology tools should be used to support these processes. Often SMEs end up playing the role of trainer for their groups.
6. Departmental Champions: Point people within each group of employees impacted by CRM. Typically they have received additional training and potentially have been involved in the design process and are charged with helping drive the success and adoption of the CRM process and tools in their groups. Champions act as first-line user support for the CRM application and for the CRM-related process and as the eyes and ears of the CRM implementation team post-launch to spot friction points and issues. They also have a key role to play in "evangelizing" the new processes and tools.
7. Consulting Partner Team: If a consulting partner has been engaged to assist you, their project lead and consultants will have key roles to play during the implementation. Typically their work hand-in-hand with the Program Lead to manage the project.

CRM Administration Team

Description: Team in charge of ongoing, regular maintenance and improvement of the CRM program.

Responsibilities:

- Providing end-user support for the CRM application. Sometimes there is a centralized help desk within the IT department that may provide basic, "tier-one" support, but even in these situations, the CRM administration team has a support role to play as an escalation point for more complex issues.
- Maintaining the health of the CRM application. Again, depending on the role of IT, some tasks may be handled outside of the CRM administration team, but they include applying software updates to the CRM application and the underlying operating system and database software, ensuring that the application is being backed up regularly both on-site and off-site, and preparing and practicing for disaster recovery. These tasks are not needed if the CRM is an SaaS deployment.
- Identifying, planning, and implementing enhancements to the CRM process and application

Roles (some may be held by members of the IT department. If not, there should be some representation from the IT department, even if it is simply as a "virtual" team member who is kept in the loop):

1. CRM Program Lead: description above
2. CRM Business Analyst: combines three strands of understanding to help define a future state in which the organization is more effective and achieving its business goals. The first understanding is how employees work today, the second is what the organization's CRM goals are, and the third is a deep understanding of how the CRM application can be configured and customized. Combining these, the business analyst can outline how a given work process and the supporting CRM application can be modified to make the organization more successful. Key skills include:
    - Experience with process design/reengineering
    - Experience with requirements gathering for technology systems
    - Experience developing functional specifications for software applications
    - Deep understanding of and experience with your chosen CRM application
    - Deep understanding of the business processes supporting by the CRM application
3. CRM Administrator: Central figure in maintaining and modifying the CRM application. This individual handles user support issues, maintains the application health, handles user management, and makes configuration changes as needed.