



# TOP 8 ERP and CRM Implementation Tips



## **Table of Contents**

- 1 Introduction
- 2 Auditing, Documentation Are Early Keys
- 3 A Well-Balanced Committee Provides Valuable Guidance
- 4 Determine Objectives for a Clear Path to Success
- 4 Engage an Executive Sponsor to Drive Adoption, Make Decisions
- 5 Choosing a Partner is Vitally Important
- 6 Reach Out Online and In Person for Recommendations
- 7 Make the Most of Visits and Demonstrations
- 8 Emphasize Adoption, Training and Education
- 8 Conclusion

# Introduction

**ERP AND CRM SOLUTIONS OFFER COMPANIES** a host of business process improvements that can increase efficiency, streamline workflows and improve data management. The level of customizability available in these platforms is another major advantage, as organizations can work with value-added resellers to include a wide array of additional functionality, be it unique elements that work in their industry or a program addressing a broader concern.

However, it's critical that all businesses recognize the complexity of ERP and CRM implementations and take the necessary steps to make the process as efficient and effective as possible. This guide provides eight pieces of critical ERP and CRM implementation advice that will help your company avoid common pitfalls as it moves through this undertaking.





*Most well-regarded implementation partners won't even start work until the documentation is in order.*

# 1. Auditing, Documentation Are Early Keys

One of the earliest and most important steps to take when it comes to ERP and CRM implementations is documenting current business processes, as well as future desires and requirements. Without easily referenced lists that detail current operations and the company's desires for the new ERP or CRM system, getting an implementation project started is especially difficult.

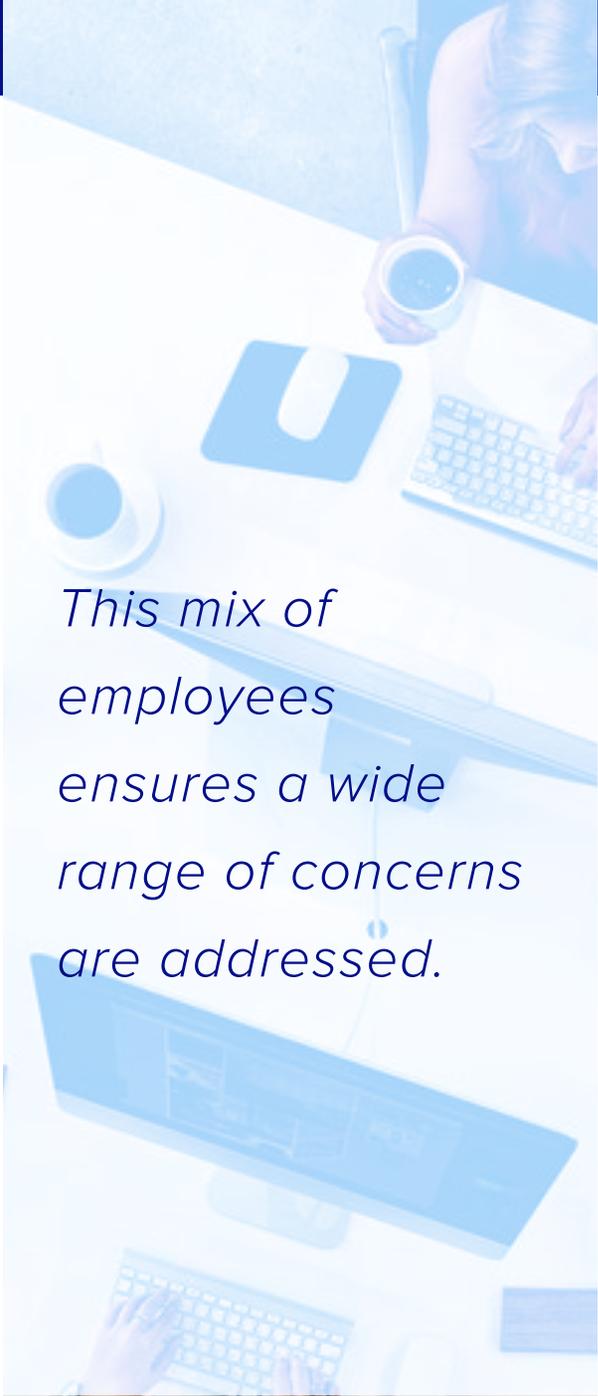
Most well-regarded implementation partners – the ones businesses

want to work with the most – won't even start work until the documentation is in order. If partners don't understand both the needs of the business and its current workflows, it's difficult if not impossible to configure an ERP or CRM solution, select the right add-ons and have a straightforward process. It also extends the length of implementation, one of the most common and frustrating issues encountered during these projects.

## 2. A Well-Balanced Committee Provides Valuable Guidance

A committee that represents ERP or CRM users across your company is essential to ensuring suggestions, concerns, complaints, compliments and questions from the people who will use the solution every day are all heard. A diverse committee should include a mix of frontline users, IT staff, group and department leaders and executive management.

This mix of employees ensures a wide range of concerns are addressed. When people from all levels of the company participate, there's a better chance issues are addressed before they grow into more serious problems. Additionally, potentially valuable suggestions for ERP or CRM functionality are voiced and considered. The committee is an especially valuable source of information before, during and after implementation.



*This mix of employees ensures a wide range of concerns are addressed.*



### 3. Determine Objectives for a Clear Path to Success

With the work of audits and documentation in hand, the committee can decide what objectives are key to the success of the ERP or CRM implementation. Having a set of goals along with a list of desired, specific changes gives an implementation partner a variety of needed perspectives and leads to a more complete and beneficial installation. A clear group of objectives also communicates broader goals that may not be evident in the specific requirements and desires a business indicates are needed for its system.

### 4. Engage an Executive Sponsor to Drive Adoption, Make Decisions

An executive sponsor who supports the implementation project is critical. As a high-level ally who supports the project and has the authority to make important decisions, they can facilitate driving adoption from the top down. The executive can participate on the committee as well, making sure he or she stays informed about the progress of the project from a variety of sources.



## 5. Choosing a Partner is Vitally Important

The right implementation partner can make or break a new ERP or CRM solution project. The wrong one will also cost companies a substantial amount of wasted money, time and effort while also leaving them with an unacceptable platform that doesn't meet clearly

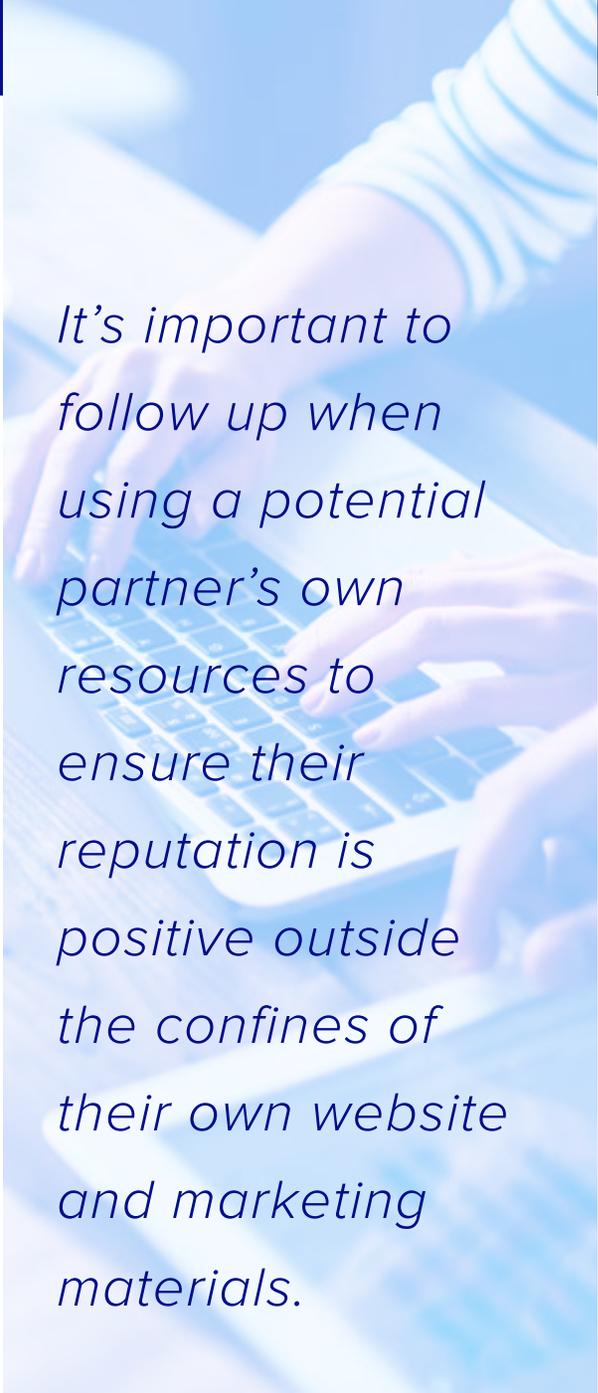
stated business needs. Choosing a partner is just as important as selecting the right solution for a company's needs. There are considerations to make when choosing the right partner.

*Choosing a partner is just as important as selecting the right solution for a company's needs.*

## 6. Reach Out Online and In Person for Recommendations

Businesses and the people who work for them have valuable professional connections they can use to seek out recommendations for ERP and CRM partners. Discussions in person can help when feasible, but it's often more convenient and a better use of time to use social networks, emails and professional networks like LinkedIn. Testimonials offered by potential implementation partners

can also help, especially when the situation described is like the one your company faces. It's important to follow up when using a potential partner's own resources to ensure their reputation is positive outside the confines of their own website and marketing materials. Businesses need to take both the recommendations they receive and conduct their own research into partners.



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*With some planning, the committee can determine a number of specific questions and requests and get the most value possible out of these visits.*

## 7. Make the Most of Visits and Demonstrations

Once a few potential implementation partners are selected, needs meetings, software demonstrations and reference calls are common next steps. Businesses should take advantage of these opportunities to gain a deeper understanding of how a desired ERP or CRM solution functions and to learn more about possible partners. The committee should meet multiple

times before the visits happen, both to determine any advanced requests – such as demonstrating a particular ERP or CRM function – and to decide on questions to ask the potential partner’s representative. With some planning, the committee can determine a number of specific questions and requests and get the most value possible out of these visits.

## 8. Emphasize Adoption, Training and Education

Every business must convince employees of the value of a new ERP or CRM solution, and some employees will be easier to convert than others. It's important to understand the impacts the changeover will have on staff members and to offer a variety of learning opportunities to address

issues. Application training is a vital component of this strategy, as are user acceptance testing and discussions about how business process workflows may change moving forward. This is an area where a good implementation partner can provide valuable assistance as well.

### CONCLUSION

ERP and CRM implementations are a major project for all businesses that implement them, but the right strategy will make the experience a more positive and fruitful one. Follow these pieces of advice to rise above potential problems.



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