CRM, the Cloud, & the Culture of Mediocrity—Implementing Success in Next-Gen CRM

JOSHUA GREENBAUM, CEO, PROQ.IO
Key Takeaways:

- **SoP**: Implementation Mediocrity and Failure
- **SaaS Doesn’t Solve This, The Cloud Makes Success Harder**
- Mediocrity Can Be Defeated and Risk Minimized
  - Track and Measure Teamwork
  - Partner for Success
  - Embrace Transparency, Accountability, and Vulnerability
The Culture of Mediocrity: Failure to Deliver

18% of projects fail to get completed or implemented
STANDISH GROUP

33% of completed projects experience cost overruns
GARTNER

43% of all projects are delivered late or over budget
STANDISH GROUP

33% of projects do not meet their goals or business intent
PMI

46% Unrealized business value

54% Realized business value

Failed or unsuccessful projects result in huge waste

Billions of $$$

Estimates by ZDNet put it at $3 Trillion
CRM in the Cloud: The Problem Continues

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Has CRM Failed?

63% of CRM Initiatives Fail

Jonathan Prezant  |  July 17, 2013

So, what are the root causes of CRM failure?

Source: CHAOS database; Data: CHAOS Survey

Marketers need to be the ambassadors into the other
The Six Phases of Project Mediocrity and Failure

Kickoff

Honeymoon

Whoops

Love/Hate

Mess o’ Hate

Courthouse
CRM in the Old Days: the Monolith in the Cloud
CRM Today: the Epicenter of the Enterprise
Next-Gen CRM and Implementation Success

- **More complexity** = more moving parts = more points of failure
- **More stakeholders** = greater exposure to risk
- **Fit to standard** vs. the need for competitive advantage in CRM processes
- **Running lean** in vendor’s cloud means implementations have to be near perfect
- **Time to success** and time to failure compressed
- **Change Management** is a more critical path than technology
Killing Mediocrity: Best Practices

- Transparency and accountability
- Measure, evaluate, and reward teamwork
- Choose your partners well
- Empower your management to be more than just sponsors
- Embrace vulnerability
## Project Management Tools: What, Not Why

### Project Summary

The website needs an overhaul as the design is outdated. The project may face issues as there is no budget allocated or planned. The project also needs a project manager as we do not have a suitable project manager.

### Key Phases

<table>
<thead>
<tr>
<th>Phase</th>
<th>Progress</th>
<th>Status</th>
<th>Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analysis</td>
<td>On Track</td>
<td></td>
<td>12-Mar-15</td>
</tr>
<tr>
<td>Design</td>
<td>On Track</td>
<td></td>
<td>15-Apr-15</td>
</tr>
<tr>
<td>Production</td>
<td>On Track</td>
<td>Complete</td>
<td>29-Sep-15</td>
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<tr>
<td>Support</td>
<td>On Track</td>
<td></td>
<td>03-Nov-15</td>
</tr>
<tr>
<td>Close</td>
<td>On Track</td>
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</table>

### Tasks Completed

- Analysis of the key components.
- Workshop on business requirements.
- Handover of the support tasks.

### Tasks Delayed

- Security testing could not be completed as there were network issues.
- Security Testing of the application.
- Development of the key components.
- Testing of the components.

### Project Budget

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Forecast</th>
<th>Actual</th>
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<tbody>
<tr>
<td>IT Costs</td>
<td>$50,000</td>
<td>$34,000</td>
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<tr>
<td>Vendor</td>
<td>$35,000</td>
<td>$500,000</td>
</tr>
<tr>
<td>Software Costs</td>
<td>$76,000</td>
<td>$4,500</td>
</tr>
<tr>
<td>Buffer</td>
<td>$45,000</td>
<td>$23,000</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$206,000</strong></td>
<td><strong>$561,500</strong></td>
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</table>

### Key Project Risks and Issues

- **Issue:** The vendor is not performing as expected, causing delays in the product being ready in time. Delays from the vendor are impacting the schedule.
- **Impact:** Impact on the project team. There could be some impact to the schedule.
Killing Mediocrity: Measuring **Teamwork**

Project execution effectiveness boils down to three primary attributes:

- **Schedule**
  - Measured and Tracked

- **Budget**

- **Teamwork**
  - Unknown
Tracking Teamwork: Measurement = Opportunity

Kickoff
Honeymoon
Whoops
Love/Hate
Courthouse
Hate
Tracking Teamwork: Week Three Aggregated Data

Rating of Serv Prov

Rating of Client

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Measuring Teamwork: Inside Story

### Performance Results by Sub-Phase

#### Weekly Pulse by Sub-Phase

<table>
<thead>
<tr>
<th>Week</th>
<th>Date</th>
<th>Domain</th>
<th>Agility</th>
<th>KnowTran</th>
<th>Vision</th>
<th>IndFocus</th>
<th>ProgDel</th>
<th>TimelyDel</th>
<th>Meth&amp;Tools</th>
<th>OCM/PostlmPl</th>
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<tbody>
<tr>
<td>1</td>
<td>26-Apr</td>
<td>Data Migration</td>
<td>5.2</td>
<td>6.2</td>
<td>4.9</td>
<td>5.5</td>
<td>4.9</td>
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<td>3.0</td>
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<tr>
<td>2</td>
<td>3-May</td>
<td>Data Migration</td>
<td>6.7</td>
<td>6.5</td>
<td>8.3</td>
<td>5.3</td>
<td>8.2</td>
<td>8.1</td>
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<td>5.4</td>
</tr>
</tbody>
</table>

#### Client Rating of Service Provider Performance

<table>
<thead>
<tr>
<th>Service</th>
<th>FuncSol</th>
<th>TechSol</th>
<th>ValueAdd</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCM/PostlmPl</td>
<td>5.4</td>
<td>4.5</td>
<td>5.9</td>
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<td>5.1</td>
<td>4.9</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>5.1</td>
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</tbody>
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Measuring Teamwork: The Longer View
What can you do to make sure your teams are working well together?

• **Partner responsibilities**
• **Customer responsibilities**
• **Vulnerability**
Three questions every customer needs to ask:

- **Service provider**: how do you measure and report on project quality?
- **Platform provider**: what tools are available for measuring telemetry?
- **Vendor**: how do you manage partner quality?
LCS Usage By Each Component

Question: How many pages visited by each component? How many unique visitors in each component?

Page visits by component (Last six months)

Unique users per component (Last six months)

Page Visits by Week (Last six months)

Page Visits by Day (Last 30 days)
You’re also part of the problem and part of the solution:

- Hold partners accountable -- build quality into the contract
- Hold project managers accountable -- don’t take “it’s okay” for an answer
- Give LOB management a role – play on the field, not from the sidelines
- Find out how and why mediocrity is tolerated and root it out
Murphy’s Law is inevitable (the IT project corollary):

- If a component can be installed or configured in more than one way, it will be incorrectly installed in the field.

So embrace it by:

- Expecting project discord, capture it, and learn from it.
  - A successful marriage is not when the ‘perfect couple’ comes together. It is when an imperfect couple succeeds despite their differences.
- Communicating based on transparency, not guesswork and innuendo
  - The single biggest problem in communication is the illusion that it has taken place.
Thank you

For further information please go to www/proq.io or contact: Josh@proq.io