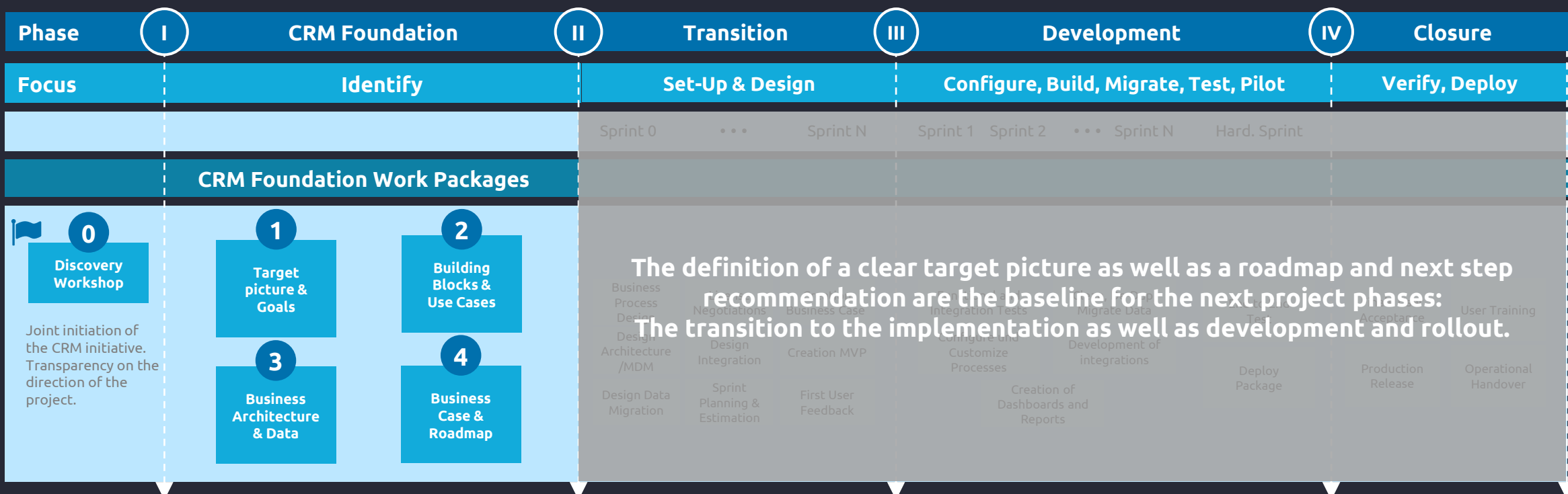# Definition of the CRM transition in four work packages based on a proven and value-oriented project approach

Proposed project approach

Phase		I	CRM Foundation	II	Transition	III	Development	IV	Closure
Focus			**Identify**		**Set-Up & Design**		**Configure, Build, Migrate, Test, Pilot**		**Verify, Deploy**
					Sprint 0 • • • Sprint N		Sprint 1 Sprint 2 • • • Sprint N Hard. Sprint		

CRM Foundation Work Packages

0 — Discovery Workshop

Joint initiation of the CRM initiative. Transparency on the direction of the project.

1 — Target picture & Goals

2 — Building Blocks & Use Cases

3 — Business Architecture & Data

4 — Business Case & Roadmap

The definition of a clear target picture as well as a roadmap and next step recommendation are the baseline for the next project phases: The transition to the implementation as well as development and rollout.

Business Process Design

Design Architecture /MDM

Design Data Migration

Negotiations

Design Integration

Sprint Planning & Estimation

Business Case

Creation MVP

First User Feedback

Integration Tests

Configure and Customize Processes

Creation of Dashboards and Reports

Migrate Data

Development of integrations

Test

Deploy Package

Acceptance

Production Release

User Training

Operational Handover

Achievement at the end of the CRM Foundation phase

The proven project approach provides a value-oriented CRM target picture and roadmap for future CRM implementation.

Provision of hands-on value and support in preparing the future CRM transformation

Providing a holistic view and a recommendation based on individual needs and requirements

Summary & results

Next Gen CRM

- Customer Experience
- Marketing
- Sales
- Commerce
- Service
- Analytics & AI
- Integration
- Collaboration

Project achievements

1 Target picture & Goals
- Sharpened **CRM target picture**
- Clear **CRM Mission Statement** to guide the project team through the CRM Foundation
- **Top 10 goals** that will make the CRM measurable

2 Building Blocks & Use Cases
- **Building Blocks** prioritized
- **Catalog of requirements** for CRM defined
- Specification of the **top Buildings Blocks** with the most important use cases

3 Business Architecture & Data
- CRM **Business Architecture** defined with connected systems
- **Data management concept** with **data flows & data migration** defined
- Possible **replacement of existing systems** by a new CRM reviewed

4 Business Case & Transformation Roadmap
- **Effort estimation** with the possibility for a cost consideration and a **rough time planning**
- **Roadmap** for the further CRM procedure with **immediate next steps**

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