FAYE | WE EAT SOFTWARE

sugarcrm

CRAFT YOUR SUGAR 2.0 ROADMAP

Ready to break free from the ‘break, fix, tweak’ cycle and unlock the full potential of your CRM? Faye’s SugarCRM 2.0 Analysis is designed to help you take a step back and re-evaluate your current CRM strategy, understanding how to better align it with your business needs.

With the right plan, nothing can stand in your way. At Faye, we know what makes a successful Sugar 2.0 strategy, but also what can delay, hinder, and cause projects to fail. Check off and fill in the following checklist to ensure that your efforts run smoothly!

1. CRAFT YOUR CRM 2.0 VISION STATEMENT

☐ **Define Objectives:**

- Identify specific pain points in the existing CRM system through user feedback and performance analysis.
- Determine overarching goals, such as increasing lead conversion rates, reducing response times, and enhancing overall customer satisfaction.

☐ **Articulate Mission:**

- Develop a concise and inspiring mission statement that encapsulates the CRM 2.0 vision.
- Ensure alignment with overall business objectives, emphasizing how CRM improvements contribute to the broader organizational strategy.

2. SEEK STAKEHOLDER FEEDBACK

☐ **Select Your Team:**

- Identify key stakeholders from various departments, ensuring representation from sales, customer service, marketing, and IT.
- Include individuals at different levels within each department to gather diverse perspectives.

☐ **Schedule Feedback Sessions:**

- Schedule both one-on-one and group sessions with each team to ensure a comprehensive understanding of user experiences.
- Utilize a combination of surveys, interviews, and workshops for a holistic approach to feedback collection.

☐ **Document Your Feedback Sessions:**

- Record detailed notes on pain points, suggestions, and potential improvements during feedback sessions.
- Categorize feedback into themes for a structured analysis that informs decision-making.

3. CONDUCT GAP ANALYSIS

☐ **Create A Capabilities Inventory:**

- Document all existing CRM capabilities and features, including specific functionalities related to sales, customer interactions, and data management.
- Consider the technology stack and integration points to assess the overall ecosystem.

☐ **Define Your Goals for CRM 2.0:**

- Clearly outline goals for the CRM 2.0 initiative, considering both quantitative and qualitative metrics.
- Align goals with the broader business strategy to ensure relevance.

☐ **Identify Gaps:**

- Systematically compare each capability against defined goals, rating alignment with objectives.
- Identify and categorize gaps based on severity and potential impact on business processes.

4. LEVERAGE NEW FEATURES

☐ **Continuously Monitor Your CRM:**

- Establish a routine for regular monitoring of CRM platform updates, subscribing to release notes, attending webinars, and participating in forums.
- Stay informed about the latest industry trends and emerging technologies.

☐ **Assess the Relevance of Your Features:**

- Evaluate the relevance of each new feature in addressing identified gaps.
- Prioritize features based on their potential impact and feasibility for implementation.

☐ **Develop A Feature Adoption Plan:**

- Develop a phased plan for integrating selected features, aligning their adoption with the overall CRM 2.0 implementation plan.
- Consider conducting pilot tests for high-impact features before full-scale adoption.

fayedigital.com | (818) 280-4820 | hello@fayedigital.com

5. DEVELOP AN IMPLEMENTATION PLAN

☐ **Create A Breakdown of Each Implementation Phase:**

- Divide the CRM 2.0 implementation into clearly defined phases, starting with less disruptive areas before addressing critical functions.
- Consider dependencies between phases to ensure a smooth transition.

☐ **Set Timelines and Milestones:**

- Assign specific timelines for each phase, defining milestones to track progress.
- Incorporate buffer time for unforeseen challenges and adjustments.

☐ **Develop A Communication Strategy:**

- Develop a comprehensive communication plan that includes regular updates, training schedules, and a feedback mechanism.
- Establish clear channels for two-way communication to address concerns and share progress.

6. IMPLEMENT TRAINING AND CHANGE MANAGEMENT

☐ **Develop Customized Training Modules :**

- Develop detailed training materials tailored to each phase, incorporating various formats such as video tutorials, FAQs, and hands-on exercises.
- Ensure that training materials align with the specific needs and roles of each department.

☐ **Execute A Workshop:**

- Conduct interactive workshops for each department, providing ample opportunities for Q&A and practical application of new features.
- Encourage active participation to enhance user understanding and engagement.

☐ **Create A User Support System:**

- Establish a dedicated support system for immediate issue resolution, offering both online and offline support channels.
- Provide resources such as knowledge bases and help desks to empower users in navigating the CRM changes.

7. MONITOR AND EVALUATE

☐ **Define Key Performance Indicators (KPIs):**

- Define specific KPIs aligned with CRM goals, including user adoption rates, data accuracy, and efficiency improvements.
- Regularly assess and adjust KPIs based on evolving business needs and objectives.

☐ **Conduct Regular Data Analysis:**

- Collect and analyze data related to CRM usage and performance regularly.
- Identify trends, patterns, and areas for optimization to inform ongoing improvements.

☐ **Host Feedback Sessions:**

- Schedule periodic feedback sessions with end-users to gather insights on the user experience.
- Use feedback to refine the CRM system iteratively, addressing both positive and negative experiences.

8. ITERATE AND OPTIMIZE

☐ **Establish A Feedback Loop:**

- Institutionalize a continuous feedback loop, implementing regular channels for users to submit suggestions and concerns.
- Establish a centralized system for capturing and prioritizing feedback.

☐ **Make Priority-based Adjustment:**

- Prioritize feedback based on impact and feasibility, addressing critical issues first.
- Consider conducting impact assessments before adjusting to understand potential ramifications.

☐ **Communicate Updates:**

- Transparently communicate updates and improvements to users, highlighting how user feedback has influenced positive changes.
- Foster a culture of collaboration and user engagement by showcasing the collaborative evolution of the CRM system.

FAYE | WE EAT SOFTWARE | sugarcrm

Are you ready to elevate your Sugar strategy
but not sure where to start?

We are here to help!

Learn more about our Sugar 2.0 Analysis and unlock the first step towards a more efficient, responsive, and tailored CRM experience that grows with your business.

Learn More