Nine tips for successful CRM integration projects

By [Lindsay Britz](#)   22 Apr 2015

Because of the complexity of the projects and their impact on all customer-related business processes, CRM integration projects can be very risky.

In fact, industry analysts estimate that the failure rate of CRM projects is between 18% and 69%. Projects can easily go over time and budget when risk factors are not identified up front and necessary adjustments aren't made.

Here are some best practices that can help ensure that your CRM integration project is a success:

- **Carefully scope and align requirements**: When the use case has been poorly thought through, requirements can change frequently and create chaos in a CRM integration project. Everyone, including IT, salespeople, customers, the software vendor, and integrators, has to agree on what the expectations are, how the project will be implemented, and over what time frame. And if they can't define the end product, they should define it in pieces. There is nothing wrong with using agile methodology, but it still helps to have a clear vision before you begin.

- **Invest in the right tools**: Undertaking a CRM integration project with the wrong tools to support your team can lead to serious issues and excessive costs. Avoid solutions that rely on manual programming or overly complex, heavy middleware software sets. Focus on single-stack, single-studio solutions with an enterprise class integration platform.

- **Create smaller milestones**: Projects that attempt to integrate everything at once are less likely to have a successful, timely, on-budget roll-out. It's best to identify the portions of the project that can provide true and immediate business benefits, and start with those. Scale down the scope of your implementation and focus on quick, easy wins while allowing your team to build its expertise and remain agile.

- **Create realistic schedules**: Aggressive schedules are fine, but impossible schedules must be avoided. Set realistic expectations by establishing an accurate estimate of the integration efforts required for your project. Add some extra buffer time for unexpected mishaps or complexities. If necessary, bring in an outside firm to provide an estimate of the effort required.

- **Use consultants when necessary**: CRM integration may be new territory for your IT staff and management. Try supplementing your experience with proven consultants or consulting firms that can leverage experience from a wide array of CRM integration projects, especially your particular vendor or reseller.

- **Manage users' resistance to change**: Introducing change to an organisation always carries with it the risk of

institutional or market resistance. Make sure the processes have been vetted by stakeholders and customers and that they are introduced properly so as to gain maximum adoption and adherence.

- **Define change management procedures**: Some organisations lack the formal methodology to handle change orders. In addition, changes to the CRM and other systems being integrated may not be locked down during the integration project. The result can be chaotic from a requirements, implementation and testing perspective.

- **Secure ongoing support**: New or unproven integration infrastructure represents a risk factor. Make certain vendor experts are available to back up your team, not only with technical bugs, but with implementation experience and best practice advice and/or services.

- **Test early and often**: Test plans should be introduced early. Test scripts and automated testing may be able to help ensure accelerated and more complete discovery of problems early in the CRM integration project.

CRM projects are instrumental for improving customer service, streamlining processes and creating a more efficient and responsive organisation. However, ensuring the success of CRM integration projects requires anticipating challenges and obstacles, and taking necessary precautions to avoid common mistakes. A well-managed CRM integration project will make your entire company happy - from your sales reps to your CEO.

ABOUT LINDSAY BRITZ

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