

The needs assessment

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SOFTWARE DEVELOPERS - SYSTEMS FOR CLIENT MANAGEMENT

“If I had eight hours to cut down a tree, I'd spend six sharpening my axe”

Abraham Lincoln

Planning is the most important aspect when investing in a new software solution, and a key part of the planning process is completing a needs assessment. The four key aspects to CRM failure are being over budget, too little or too much functionality, behind scheduled implementation, and user adoption. All of this can be avoided by completing a need assessment. Before planning your strategy and implementation of your CRM solution, establish a core team of individuals, including a project manager, to oversee and manage the whole process. A CRM solution is one of the most valuable tools your organisation will have at its disposal, therefore allocate time in your diary to hold a team meeting and complete a need assessment.

We know this can be difficult to do because some users are in customer facing roles and need to concentrate on serving your customers. Therefore, try and elect one person from each area that has the responsibility to collect the views of their selection of users. This will not only help you make knowledgeable decisions that are beneficial to all areas of your organisation, but also improve the success of the implementation of your CRM solution because you have the time and views to determine the budget, the timescale, and the features the users want, which will improve the user adoption rate of the new solution.

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Key points in your needs assessment should include

- Analysis of our current process and highlight which ones are working, which are not, why?
- What is it about our current system that is most frustrating or troublesome?
- What steps are required to solve the problem?
- What do we want to achieve?
- Is new software the solution to our problems?
- What impact will these changes have?
- What will happen to your organisation if these changes are not addressed?
- Do we need a CRM?
- Do we need online CRM, on premise CRM or a combination?
- How many system users will we have? Don't forget to include administration, technical, customer service representatives and off premise users.
- What features, and key fields will do we need?
- What reporting capabilities will we need?
- When do we need the CRM?
- What is our budget?
- Is there a solution currently available that matches our requirements?
- Would the solution need to be tailored?
- Do we need a bespoke solution?
- What kind of solution is best for our organisation?

By asking yourself these questions you will be able to find a CRM solution and provider, that emulates the positive ways you do business as well as incorporating and helping you achieve your future business goals.

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