

Client Relationship Management System: Governance & Demand Management



Situation:

A non-profit organization was unable to track, manage and fulfill business demand for enhancing its CRM to meet critical business requirements.

Despite having defined a release roadmap for its CRM enhancements, a non-profit organization was struggling to deliver any of them on time, on scope or on budget.

Development requests were not first vetted for appropriateness against the roadmap, nor reviewed for soundness of design. Delivery dates seemed to be set based on business demand not technology capacity. Technology did not follow a model to size effort or skills required to effectively manage expectations according to feasibility or timing of delivery.

As the backlog of business requirements grew, quality of implementation eroded, which only compounded the backlog. Rework of deliverables initially thought to be completed pushed out delivery of outstanding demand even further.

Business leaders accused Technology teams of incompetence. Technology leaders accused the Businesses of unreasonableness. The only common ground was blaming the vendor for all problems.

Unable to break the cycle of continuous mismatches of demand and supply, the non-profit organization asked Stanton Blackwell to assist them in establishing a governance and execution discipline for successful delivery against their roadmap.

Stanton Blackwell's Role:

Analyze the disconnect between business demand and technology capacity, while developing the discipline for prioritized delivery: on time, budget, and scope.

We started with defining a governance model, including a senior governance committee (senior most decision makers allocating budgets), steering committee (business leaders informing demand), and a program office (managing requirements, presenting status and requests for decisioning). The governance model was instrumental in objectively defining CRM release schedules and allocating budget and resources to support successful delivery. It alleviated the competition for supply and provided clarity of priority of demand. Importantly, the governance model assured that along with enhancements, sufficient time and effort were dedicated to system maintenance and hygiene to ensure overall health of the platform.

Second, we worked with the organization's business and technology teams to establish a demand intake process to ensure accuracy of captured requirements, effectiveness of review and sign-off of designs, and consistency in cost and time estimation practices. All of this was in support of transparency and predictability of delivery on time, on scope and on budget.

Next, we worked with the non-profit's technology team to shore up their capacity planning and scheduling practices. Recognizing CRM development was only one of their focus areas, the technology team needed assistance in establishing objective disciplines for sequencing their work across their full scope of demand. Most importantly, we assisted them in developing a standard communication protocol with all their business stakeholders to provide transparency of status of deliverables.

Finally, we defined and implemented a vendor engagement operating model to enable the non-profit to manage cost, timing and deliverables of the development and support of the CRM system executed by third party vendors. The vendor management model enabled the client to significantly improve its ability to manage deliverables and performance by their service providers.

Result:

Transparent and predictable delivery of prioritized CRM enhancements

We were able to introduce disciplines that dramatically improved the accuracy and quality of delivery against the CRM roadmap. Implementing a governance model assured senior oversight in the prioritization of business capabilities to deliver, and senior approval of the resources required to do so. We implemented demand intake operating procedures that significantly improved requirements capture and solution design processes. We institutionalized technology capacity planning and scheduling disciplines that greatly improved accuracy and transparency of commitments on scope, budget and timing of delivery.

The disciplines introduced for management of the non-profit's CRM system were then extended across its overall technology portfolio.



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Alex offers Stanton Blackwell almost 25 years of experience in strategic planning, program management, and project execution, with a specialization in technology governance and operational efficiency. She helps clients simplify a broad scope of issues and opportunities, into a prioritized, impactful and achievable solution roadmap, and then supports its execution.

SIB About Stanton Blackwell

Stanton Blackwell is an advisory firm dedicated to the middle market and mission-based sectors. Our professionals provide operational and financial consulting, as well as leadership development, to address issues of business planning, capital adequacy, scalability and efficiency. We work closely with our clients to adapt to an increasingly complex operating environment and to enhance impact and business value.

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