

CRM28

Integration and Migration Projects

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CPE Credit

- In order to receive CPE credit for this session you must be present for the entire session.
 - Session code: **CRM28**
 - Recommended CPE credit: **1.5**
 - Delivery Method: **Group Live**
 - Field of Study: **Specialized Knowledge and Applications**
- Visit the Continuing Professional Education kiosks to enter CPE credit during the conference.



Availability

- This presentation will be available online after the conference. You will receive an email for the Insights session Website approximately 4 weeks after Insights.



Agenda

- Overview of integration/migration projects
 - Primary project risks
- Project methodology
- Tools and case studies
- Q & A



Introduction to InaPlex

- Specialist in CRM integration
 - Focus on mid-market CRM
 - Cover full range of Sage CRM solutions
- Sage Endorsed Development Partner



sage

Endorsed Solution

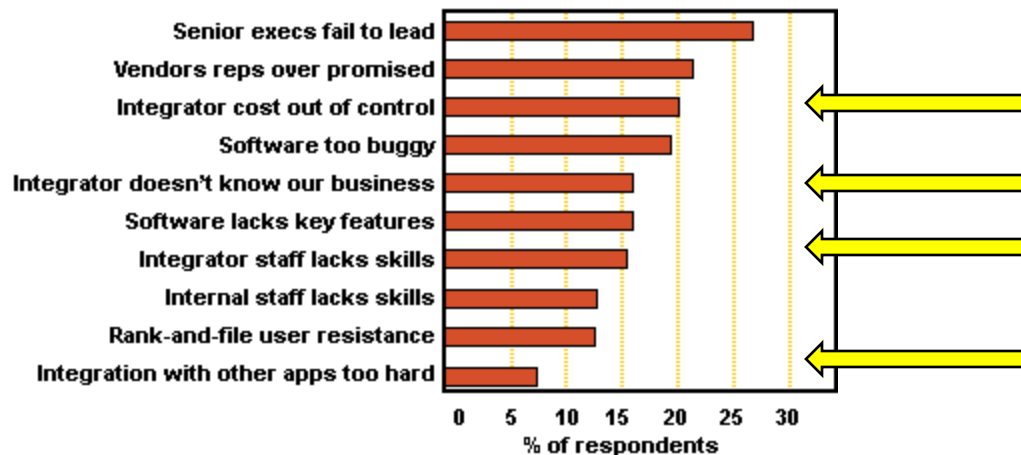


Why are we here?

- A few years ago, it was asserted that 50-80% of CRM projects failed
- Experience with CRM implementation is growing, and we are getting better
- The key success factors are well known by experienced CRM partners
- BUT...

IP CRM Project Failure

- A recognized comparable research study focused on why projects fail was performed by Peerstone Research (www.peerstone.com). This study focused on projects that involve application software implementations and external professional services.
- However,...



Integration Issues

57% of total



CRM Integration Projects

- Most integration projects are tough
 - Defining project can be difficult
 - Data is messy, complex
 - Requirements change
 - Politics – who “owns” data



Case 1: Project Failure

- UK company transferring legacy Access based system to SageCRM
 - Project has taken 8+ months, still not complete
 - Several iterations of transfer
 - Legacy system still running alongside SageCRM
 - Sales complaining that SageCRM information not complete or accurate
- **Breakdown of trust in system, implementers**



Case 1: Project Failure

- Legacy system was developed in house
 - Developer was asked to lead migration to new system
 - No firm time frames established by management
 - No criteria for success / failure



Case 2: Project Failure

- “I was all up for that if they wanted it. But others I talked to were not as enthusiastic. For example, a couple of the older guys didn't want to share their contacts because they thought this is what set them apart. There were a few others that were too busy doing what made them successful (and it didn't involve a computer) to keep the system up to date.

The bottom line is that only a very few were using the system regularly so we had to still have our monthly meetings and weekly [phone](#) calls to review the prospects we were working on. So, that just reinforced that the system didn't work.”



Primary Risks

- **Management (or lack thereof)**
 - Need management buy in
 - Get resources
 - Arbitrate ownership and process battles
 - Clear business objective
 - Won't get true management buy in without it
 - Clarifies project, what gets done, what doesn't



Primary Risks

- **Planning**

- Prior Planning Prevents P*** Poor Performance
- Finding all the data
- Poor, incomplete, inaccurate data
- Hurry up and wait – putting projects on hold

- **Needs to include realistic time frames**

- Not just to implement, but to live with results, learn, roll out on a wider scale



Primary Risks

- **Scope Creep**
 - “That is not what I wanted”
 - “That looks cool – how about we add this stuff”
 - “I forgot about this spreadsheet – can you add it in”
- Well defined business objectives are a good defence
- Management buy in provides ability to say “no”



Project Overruns

- Results of a survey of developers

Issue	Votes	%
Changing specs	276	28.66
The project was interrupted by other work or demands	138	14.33
The deadline was decided by marketing rather than R&D	128	13.29
A lack of understanding as to the scale of the work involved	110	11.42
Plain old bad estimations of how long it would take	102	10.59
Incomplete (or missing) specs?	93	9.66
The developers involved weren't asked how long it would take	71	7.37
Insufficient budget or resources	20	2.08
Total	963	100%

IP Project Overruns

- Survey results categorised

Issue	Votes	%
Specifications		49.74
Changing specs	276	28.66
A lack of understanding as to the scale of the work involved	110	11.42
Incomplete (or missing) specs?	93	9.66
Planning		38.21
The project was interrupted by other work or demands	138	14.33
The deadline was decided by marketing rather than R&D	128	13.29
Plain old bad estimations of how long it would take	102	10.59
Other		9.45
The developers involved weren't asked how long it would take	71	7.37
Insufficient budget or resources	20	2.08
Total	963	100%



Lessons from the world of software

- Old Model – **Waterfall**
 - Specification – document everything
 - Architecture – design the solution
 - Implementation – code the solution
 - Test and deliver
- Specification change is difficult
- User does not see until end of project



Lessons from the world of software

- **New Model – Iteration**
 - Short cycles, high customer involvement
 - Design small objective
 - Implement – test – deploy
 - Get feedback
 - Do it again



Lessons from the world of software

- Specifications are ***expected*** to evolve
- Early and continuous user involvement
- **Relies on tools that support process**



Tools: Implementation

- Implementation typically mixture of:
 - Code - Visual Basic, Scripting
 - SQL Stored procedures and Triggers
 - DTS
- Hard to
 - *build, maintain, test, change, document*
 - *start / stop*



Tools: Implementation

- SQL Server Integration Services
 - Integrated with SQL Server Management Studio
 - Big tool set
 - Complex to develop in
 - Can require programming skills
 - Not specialised for CRM



Tools: Inaport

- Inaport from InaPlex
 - Specialised adapters for
 - SalesLogix, SageCRM, SageCRM.com, ACT
 - Easy to use UI with Wizard for developing profiles
 - Profiles are XML, can be versioned
 - Specialised for CRM



Tools: Inaport

- Inaport version 7.1
 - Documentation
 - Logging
 - Email
 - Chain control



Case 3: Data diagnosis using SQL

- Migrating Siebel accounts to CRM
- First pass:
 - Siebel accounts: 16,538
 - CRM Companies: 7,794
- Useful queries and tricks with SQL Management Studio



Case 3: Data diagnosis using SQL

- Database diagrams
- Cross database queries
- Using count(), sub-queries
- Duplicate checking



Case 4: Matching

- TimeLinx project
 - SFDC, Act, SalesLogix, Excel, ...
 - All into new SalesLogix system
 - Complex matching because of different systems
 - Use combination of techniques



Case 4: Matching

- Combination of exact and fuzzy match
- Use excluded records table for post processing



Tools: Version Control

- A project will normally generate a lot of documents
- Version control allows you to have:
 - Central repository, all users have access
 - Log all changes to all documents
 - Roll back to previous version
 - Compare versions to see changes



Tools: Version Control

- Suggested project structure:
- Project
 - Profiles
 - Doco
 - Scripts
 - Logs (not versioned)



Tools: Version Control

- Subversion (www.tigris.org)
 - Open source project, extensively used by developers around the world
 - Simple set up, can also be hosted
 - Very good Windows client



Tools: Version Control

- Client – Tortoise SVN
 - Windows Explorer integration
 - Right click access to
 - History
 - Roll back
 - Add, commit, move, delete



Tools: Project Management

- Assembla (www.assembla.com, freemium)
- Combines
 - Version control
 - Tickets
 - Wiki
 - More...



Tools: Project Management

- Assembla
 - Web based (Amazon S3 hosted)
 - Easy setup
 - Limited security model
 - In rapid development



Tools: Collaboration

- Dropbox (www.dropbox.com) - “freemium”
 - Windows integration – create folder, drop files in, automatically shared to all others in team
 - Versioning and history on files
 - Security model lets you selectively share folders



Tools: Collaboration

- YouSendIt (www.yousendit.com) -
“freemium”
 - Good FTP replacement
 - Secure delivery, no client, web access
 - Windows Explorer client makes sending files easy



Tools: Collaboration

- Wikis
 - Web based writable documents (Wikipedia)
 - Consider using for specification documents, mappings
 - Most implementations support versioning, edit history
 - Range of open source and chargeable products
 - Also range of hosted options



Implementation

- InaPlex can also provide:
 - Training
 - Web based, scheduled for you
 - Tailored for your projects
 - Professional Services
 - Extensive experience of integration projects



Summary

- For a successful project
 - Clear business objective
 - Management buy in
 - Iteration model
 - Start small, succeed, iterate
 - Plan the whole process
 - Business processes, tool sets, time frames



Questions?

- Don't forget the survey... 😊

Thank You

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