

Sträva

TECHNOLOGY GROUP

IT and CRM Solutions for Today's Business

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for Microsoft CRM & Dynamics 365





IS YOUR CRM SYSTEM MEETING EXPECTATIONS?

CRM implementation projects are complex and riddled with landmines that can cause significant issues or even failure. In 2001, Gartner published one of the first studies examining failure rates of CRM initiatives. They found that 47% of projects failed or failed to meet expectations.

Over the last decade and a half, failure rates have not decreased substantially. We have discovered, and most industry analysts agree, that there are a limited number of core reasons for CRM project failure. The reasons do change from enterprise to SMB and slightly by industry but all stem from the same high-level reasons.

TOP REASONS FOR CRM PROJECT FAILURE

- ▶ Executive/Management teams not enforcing the use of the system
- ▶ Lack of proper requirements Analysis before implementing
- ▶ Improper training for end users
- ▶ Adequate system testing not performed before go-live
- ▶ Lack of necessary funding for the project
- ▶ "Scope creep" & cost overruns
- ▶ Inadequate ongoing support for end users, management & executives
- ▶ Allowing the solution to become stagnant

Is Failure an Option?

Many projects fail after going live. Businesses are not educated or prepared for what needs to be done to properly maintain and support a CRM system. Energy and attention to the project wanes, user adoption falls and failure sets in.

To either avoid or recover from a failed CRM initiative, there are a number of key items that must be addressed. If you are in recovery mode, it is imperative that the proper steps be taken as a second failure all but assures future recovery will be impossible. If you are in pre-launch mode now is the time to mitigate failure risks.

WE CAN HELP! If you are beginning your CRM journey, getting ready to launch or are faced with a failed implementation, you may need expert help to protect the substantial investment in CRM.

We offer a no-cost review of your implementation. During this collaborative session we revisit the goals & objectives, determine what's working and not and develop a plan to get you to the desired future state. Once your project is stabilized, you need a solid plan for supporting and administering the system ongoing.

Typical Support Options

When a business implements a CRM solution like Dynamics CRM/365, they typically work with an implementation partner. There is a lot of activity during the implementation but once the implementation partner's engagement ends, the business has to decide on how to support the solution going forward. There are generally two options:

- ▶ **Support the solution internally** - Some businesses decide to support the solution internally either by ramping up someone or by hiring a resource. In either case there is significant cost and a single resource's skill set will always be limited therefore external help would likely still be needed. Additionally Dynamics CRM/365 talent is in great demand making it challenging to find and retain resources.
- ▶ **Engage with your implementation partner** - Most implementation partners offer ongoing help desk/break fix support or even "managed services". While there is value in help desk/break fix support, it is only one component of the necessary overall support that is needed. This type of support does not include enhancements or customizations as your business and needs change. It is extremely difficult to nail every configuration during implementation. Very quickly you realize that additional configurations, customizations and enhancements are needed. In the break fix model you are typically faced with additional fees (most times hourly time & materials) to get these put in place. Many times this creates a "rock/hard place" situation where the business has invested significant money to get the solution implemented only to realize that it is failing to meet expectations. Securing additional budget for enhancements can be very difficult or impossible causing the solution to become stagnant, user adoption falls and management is not happy with the system.

We have the solution...

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#TotalSolutionManagement

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TOP 10 BENEFITS OF TOTAL SOLUTION MANAGEMENT

1. Significant savings over hiring & retaining internal resources
2. Broad and deep skill sets far beyond that of internal resources
3. Gain an entire team of certified, experienced CRM experts
4. Enables you to stay focused on your core business
5. Use of consistent best practices
6. Ongoing consultative guidance
7. Continued improvement of your system
8. Improved security & compliance
9. Agility - Get issues resolved faster and enhancements completed quicker
10. Reduce risk

For a fixed monthly cost we provide your business an entire team of skilled, certified and experienced CRM experts.

Our team holds **36 Microsoft certifications** and **15 Microsoft CRM competencies**. We have experience spanning the entire Microsoft CRM/Dynamics 365 platform.

The answer is our **TOTALSOLUTION MANAGEMENT** service. For a fixed predictable monthly cost we provide your business an entire CRM support & system administration team. Our service includes:

- **Unlimited Help Desk support** for either end users directly or your admin/IT team
- **Enhancements to the system**
 - User interface modifications
 - Create/modify views
 - Create calculated/rollup fields
 - Administer Goal Management Module
 - Perform data imports
 - Create/modify workflows, reports & dashboards
- **Proactive & Preventative Maintenance**
 - Monitor system jobs, database size and health
 - Review & remediation of system jobs and message flows
 - Monitor and resolve any issues with server-side sync
 - Monitor/manage data integrations
 - Creation and monitoring of bulk deletion jobs
 - Perform regular Backups of the system
 - SQL database health check and maintenance (on-premise systems)
- **User & Security Role Management**
 - Create new users
 - Manage security roles
 - Manage licensing & renewals
- **User Adoption Monitoring & Management**
 - Identify your specific uses of the system to be monitored
 - Implement user adoption monitoring tools
 - Ongoing reporting on user adoption
 - Quarterly survey of your users
 - Remediation of user adoption issues through training and one-on-one coaching
- **Manage One Major Version Upgrade Per Year**
 - Review system for compatibility with new version (Customizations, 3rd party solutions)
 - Manage scheduling of the upgrade with Microsoft
 - Full new version training for your users
- **Unlimited Maintenance Based Upgrades**
- **Unlimited Access to Bi-Monthly Web Based Training Sessions**
- **Quarterly Solution Road-Mapping Session**
 - Review overall system use
 - Identify any problem areas and plan for remediation
 - Review support case history
 - Review current and upcoming versions
 - Review User adoption reports
 - Review user base surveys for current period
 - Review & discuss new functionality & 3rd party solutions that may add value
 - Review licensing, renewal and budget

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	Standard	Enhanced	Premium
Unlimited Help Desk Support	X	X	X
Proactive & Preventative Maintenance		X	X
User & Security Role Management		X	X
Bi-monthly Web Based Training		X	X
Onsite Training		X	X
Maintenance Upgrades		X	X
Major Version Upgrades		X	X
User Adoption Monitoring & Management		X	X
ClickDimensions Support & Campaign Assistance			X
Quarterly Road-mapping			X
Enhancements			X

Contact us to discuss how TOTAL SOLUTION MANAGEMENT could benefit your CRM implementation

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