

Zippy Publishing CRM Implementation

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Background of Zippy Publishing



- Growing eBook business founded in 2017 based in Gainesville, GA
- Mission: creating opportunities for connecting, changing, and improving lives through reading
- 50 Employees, 10 Sales
- Revenue: \$1 million
- Offers eBooks and online magazines, as well as Editing and publishing services

The Problem with Zippy Publishing



- Growing rapidly since the second year of operation
- Having difficulty leveraging employees effectively
- Having difficulty managing new and existing customer relationships
- Decreasing profitability

Purpose



The implementation of the new CRM solution for Zippy Publishing was brought to life to solve the most critical challenges Zippy Publishing has encountered thus far.

The Company is struggling with maintaining a competitive business model due to internal struggles:

- Leveraging Employees
- Profitability
- Managing Customer Relationships

As an organization, we are implementing measurable goals to determine the success or failure of our CRM implementation. These measurable goals will aid our team in determining what is working, as well as what is not working, regarding the new CRM solution.

Measurable Goals / Success Criteria



- Zero delays in eBook deliveries
- Consistent increase in new customer relationships - with a goal of at least five new customers every other week and one new author available for purchase
- Gradual rise in profitability after CRM implementation - with a goal to reach a 10% increase in profitability within three months after implementation of CRM

Project Approach



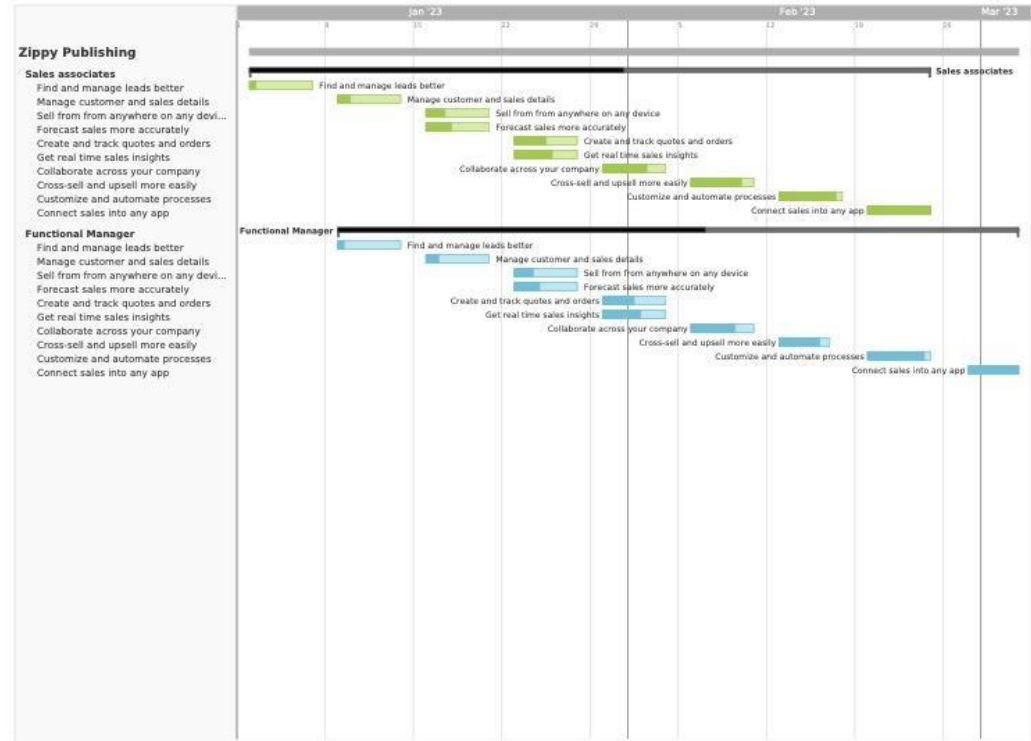
We plan to *slowly* implement the professional version of Salesforce. The deployment will be over a three-month period and will be implemented only for sales employees. This will provide features such as task management, customizable sales processes, mass emailing, and more which will allow our employees to better leverage their skills. We will complete the following steps in order when implementing this CRM

- Begin with purchasing the CRM and ensuring that it is properly installed and running on company devices.
- We will then begin training our sales employees on how to use the software.
- Next, we will monitor and receive feedback from our end users and benchmark their understanding of the CRM
- In closing, we will make Salesforce Professional version available to the functional managers to provide all the information needed to their staff

Original scope

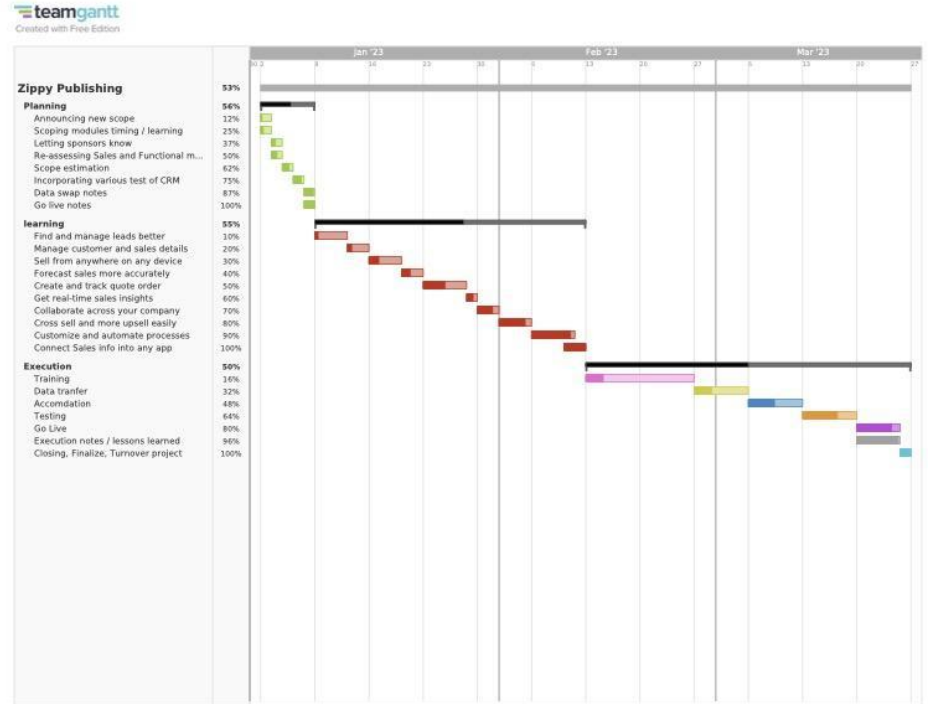
- Original Scope is the first 9 weeks of 2023
- The main purpose was to get Sales and Functional managers to learn CRM
- Functional Managers will be a week behind sales
 - Information on would flow to departments

teamgantt
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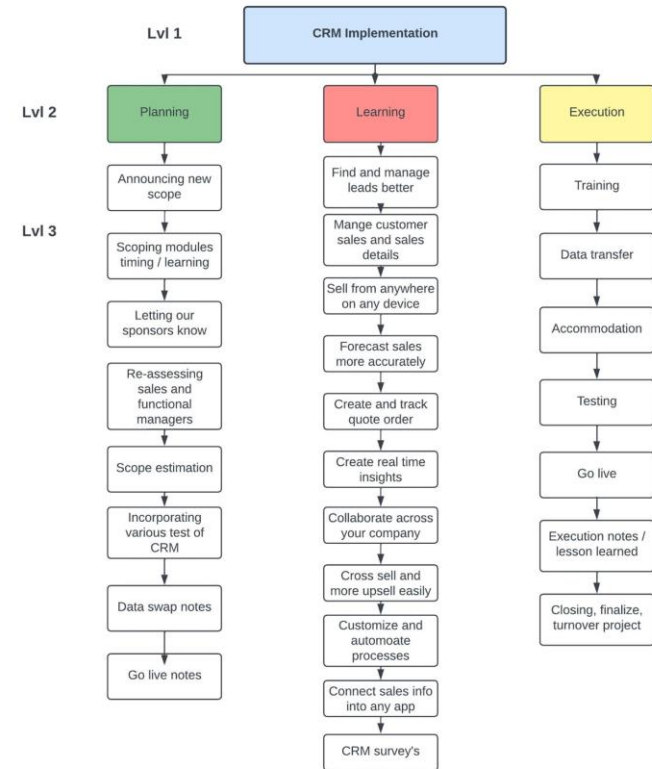
New Scope

- Roadmap is in accordance to Project management life cycle
- Re-scoped to 3 months
- Replanning and accordance with higher management
- Each module of Salesforce professional
- Training two weeks
- Accommodation of new CRM System for users
- Testing for full functionality
- Go live



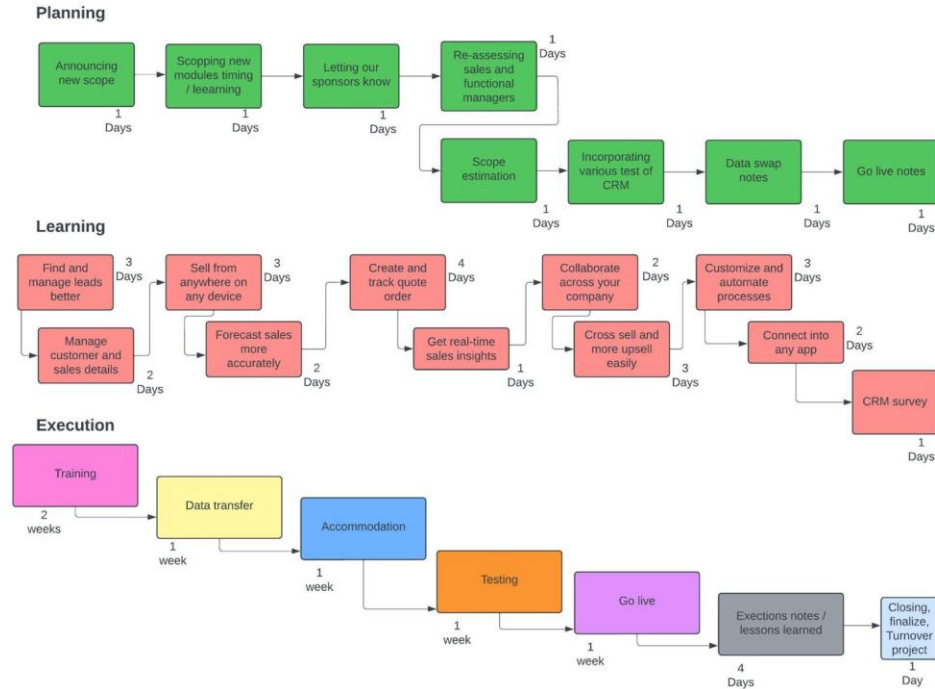
Work Breakdown Structure

- Level 1 overall implementation
- Addressing stakeholders and those involved within planning
- The modules of the professional version
- Surveys of the implementation closes out this phase
- After learning throughout all the modules the training will begin for users
- While users learn they will transfer their old data over
- Execution notes
- Turnover to project



Critical Path Diagrams

- Planning will be simple, re-evaluating upper management
- Learning will be dependent on the size of the modules
- We will give users two weeks time to fully try to understand the CRM
- Execution will take place the last week
- Closing, turnover to zippy will be the 90th day



Change Request

- Any sort of request or change for the implementation must be filled out via this form
- Depending on the
 - Cost
 - Urgency
 - Time
 - Impact
- Will the change be taken into consideration
- All request will include the PM
- Any significant change will need a signature of
 - Sponsors
 - Steering committee

**Project
Mangement office**

Change Request

Name: _____ Which Phase: _____
Date: _____ (Planning, Learning, Execution)
Employee ID: _____

Type Of Urgency

<input type="checkbox"/> Emergency	Will this impact the end date?	Yes / No
<input type="checkbox"/> Relatively		<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> Slight	Is there any cost associated with this change:	<input type="checkbox"/> <input type="checkbox"/>

Description of proposed change

Solution

Why / who Will benefit

Key Roles and Responsibilities

<u>Role</u>	<u>Responsibility</u>
Project Manager	Responsible for all project planning, including defining tasks and estimating efforts. Ensures successful implementation of salesforce using proper resource allocation, communication skills, and knowledge of appropriate project management methodologies. Also responsible for approving the project, allocating funds, and clearing major issues.
Systems Analyst	Analyze the business case for a Salesforce implementation to determine the needed requirements and functionality needed for our sales team. The systems analyst will ensure that the ideal solution is implemented that has both the necessary functionality and confirm the feasibility of the project.
Product Owner	Work in conjunction with the systems analyst to determine system requirements and ensure that the team has an adequate understanding of the gaps that will be filled when implementing the CRM. The primary role of the product owner is ensuring that the needs of the sales team are clearly communicated and that the correct system requirements are being prioritized.
System Administrator	This team member is tasked with the role of administration of the CRM. This will involve things like configuration and technology management. It is the system administrator's responsibility to make sure that Zippy publishing has the technology necessary to effectively implement Salesforce.
Trainer	Training the sales team on using the newly implemented CRM and ensure that they are able to effectively leverage the software to achieve the desired results.

Managing and Controlling The Project



Project success is determined by proper balancing of scope, cost, and time to complete. We will be using the following methods to ensure the project is always properly controlled and monitored:

- We will conduct an Earned value analysis to measure the value of the CRM over time
- We will put a formal process in place for change requests
- We will have formal acceptance of completed project deliverables
- We will have an approved scope baseline
- We will monitor the quality of all deliverables with a formal review meeting attended by all stakeholders

With the proper monitoring and control in place, we can be confident that this project has a high likelihood of success.

Estimated Effort and Risks



This project is estimated to have low to moderate risk. We used probability and impact qualitative analysis to identify the risks we needed to prioritize. We will escalate the high-level risks to upper management. The primary risks are as follows:

- CRM being unreliable
- Sales employees refusing to use the software
- CRM data breaches
- Employees not being able to leverage the software effectively

The risk will be mitigated by:

- Thorough research on reliability before implementing CRM
- Thorough training to ensure that all employees are able to effectively leverage the CRM
- Ensuring the project manager has the authority to make tactical changes in the implementation of the CRM

With the analysis we have in place, we are confident that we can implement the CRM without issue

Recommendation



- This project will bring more value to Zippy Publishing as a company and begin the track to resolve core organizational faults. Implementing Salesforce Professional allows Zippy Publishing to utilize a vast amount of resources to solve the problems weighing Zippy down all these years. The features and modules in Salesforce professional will give its employees the correct tools to streamline profitability, leverage its employees, and communicate effectively with its clientele.
- **With the features of Salesforce Professional highlighted this will help impact**
 - No delays in eBook deliveries
 - Consistent and streamlined communication with customer and other knowledge leaders within Zippy Publishing
 - Features that will help leverage and efficiently place employees
- **The features of Salesforce Professional will given will help employees better utilize themselves**
 - Consistent increase in new customer relationships - with a goal of at least five new customers every other week and one new author available for purchase
 - Better manage who has what leads or customers
 - Customize sales processes or documentation per customer
- **We have garnered a sophisticated plan of action for the CRM implementation**
 - Given a time frame for gathering funding, while giving a time frame for those the time to learn and utilize the CRM.



Thank you!

We hope you enjoyed and can see the potential success in our CRM implementation plans.