

ACTIVITY#9

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Direction: Answer the following question.

1. Give one phase of CRM implementation and explain it.

An essential step in the CRM implementation process is requirements collecting and analysis. During this phase, the project team closely works with stakeholders to understand the specific needs and objectives of the company. This involves doing workshops, questionnaires, and interviews to learn about the current methods, issues, and desired outcomes. After that, the team looks over this information to ascertain the functional and technical requirements for the CRM system. To ensure that the CRM system meets the goals of the company, it is essential to have precise documentation and communication during this phase.

2. What are some common aspects involved in upgrades to a CRM system?

- **Software Assessment:** Analyzing the existing CRM program to find flaws, restrictions, and out-of-date features.
- **Testing for compatibility:** Making that the latest version of the CRM is appropriate for use with current hardware, modifications, and integrations.
- **Data migration** is the process of moving current data, while preserving consistency and integrity, to the new CRM system.
- **User training** is the process of introducing new features and functionalities to users through instruction sessions.
- **Change management** is putting plans in place to deal with opposition to change and make sure the move to the updated CRM system goes smoothly.

3. Give 1 Upgrades and 2 Change Management in Crm

Upgrade

- **Post-Upgrade Support:** Provide ongoing support and monitoring to address any issues or concerns that arise after the upgrade.

Change

- **Stakeholder Engagement:** Involve key stakeholders in the CRM implementation process from the beginning to gain their support and input.
- **Feedback Mechanisms:** Establish feedback mechanisms to gather input from users and stakeholders throughout the CRM implementation process.

4. Give the 8 CRM Implementation Pitfalls

- **Lack of Executive Buy-In:** Without support from top management, CRM initiatives may lack resources and fail to gain traction.
- **Poor Requirements Definition:** Inadequate understanding of business needs can result in a CRM solution that does not meet expectations.
- **Insufficient User Training:** Inadequate training can lead to low user adoption and underutilization of the CRM system.
- **Data Quality Issues:** Poor data quality can undermine the effectiveness of the CRM system and lead to inaccurate reporting and decision-making.
- **Overcustomization:** Excessive customization can increase complexity, maintenance costs, and the risk of system instability.
- **Inadequate Change Management:** Failure to address resistance to change can hinder user acceptance and adoption of the CRM system.
- **Lack of Integration:** Failure to integrate the CRM system with other business systems can result in data silos and inefficiencies.
- **Inadequate Post-Implementation Support:** Lack of ongoing support and maintenance can lead to system stagnation and failure to evolve with changing business needs.