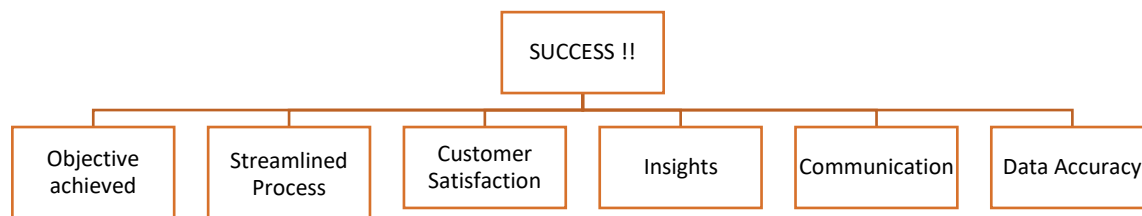


HEC MONTREAL CASE C by Mahua Hiray

In your view, was the CRM project a success, why or why not? Explain your response in detail.

The CRM project implemented by HEC Montreal **can be considered a success** as it achieved its primary objective of improving customer service and communication, streamlining processes, increasing customer satisfaction, generating valuable insights, improved communication, and data accuracy. Though the project faced challenges, the benefits of implementing the CRM system outweighed the costs, resulting in a better overall student experience.



1. **Achieved its primary objective:** The primary objective of the CRM project was to improve the quality of customer service and communication, which was successfully achieved through the implementation of the CRM system. The system provided a centralized platform for storing and accessing customer data, which enabled HEC Montreal to maintain accurate and up-to-date information about their customers, resulting in better communication and support.
2. **Streamlined processes:** With the integration of the CRM system, HEC Montreal was able to automate several of its processes, such as admissions, registration, and student services. This reduced the workload of its staff and ensured efficient delivery of services to the students.
3. **Increased customer satisfaction:** The CRM system provided a centralized platform for handling student inquiries and requests, which ensured that they received timely and personalized responses. This improved the overall student experience and resulted in higher levels of satisfaction.
4. **Generated valuable insights:** The CRM system helped HEC Montreal in generating valuable insights about the student population. The system allowed HEC Montreal to track student behavior and preferences, which helped in identifying areas of improvement and tailoring their services to meet the needs of their students.
5. **Improved communication:** The CRM system improved communication between various departments at HEC Montreal, as it provided a centralized platform for storing and accessing customer data. This enabled staff to have a more comprehensive view of the students' needs and interactions with the school, resulting in better coordination and communication.
6. **Improved data accuracy:** The CRM system enabled HEC Montreal to maintain accurate and up-to-date information about their customers. This improved data accuracy and reduced errors and inconsistencies in communication with students, resulting in a better student experience.

What are your three key takeaways from this case? Specifically, to what extent did HEC Montreal follow or fail to follow the Project Management disciplines we discuss during the semester?

For question 1) My three key takeaways from the HEC Montreal CRM project case are:

1. **Importance of project management discipline:** The HEC Montreal CRM project highlights the importance of following project management disciplines to ensure project success. The project management principles, such as clearly defining project scope, establishing a project plan, and identifying project risks, were critical in ensuring the CRM project's success. HEC Montreal's adherence to these principles resulted in a well-executed project that achieved its goals.
2. **Need for effective communication:** Effective communication is crucial for the success of any project, and the HEC Montreal CRM project is no exception. The project's success can be attributed to the clear communication between project stakeholders, including the project team, vendors, and end-users. Effective communication facilitated collaboration, risk management, and issue resolution throughout the project lifecycle.
3. **Importance of stakeholder management:** The HEC Montreal CRM project case emphasizes the importance of managing stakeholder expectations throughout the project lifecycle. HEC Montreal ensured that all project stakeholders were involved in the decision-making process and kept informed about the project's progress. This resulted in better buy-in and support for the project and ensured that project deliverables met stakeholder needs and expectations.

For question 2) HEC Montreal followed several project management disciplines that were discussed during the semester, including:

1. **Clearly defining project scope:** HEC Montreal clearly defined the project's scope, including the objectives, deliverables, and timelines. This ensured that project stakeholders had a shared understanding of what the project aimed to achieve and what was required to deliver it.
2. **Establishing a project plan:** HEC Montreal created a comprehensive project plan that detailed the project's tasks, timelines, and resource requirements. The project plan provided a roadmap for the project's execution, ensuring that the project team had a clear understanding of their roles and responsibilities.
3. **Identifying project risks:** HEC Montreal identified potential project risks and developed mitigation strategies to address them. This proactive approach to risk management ensured that the project team was prepared to address potential challenges and minimized project delays.

However, HEC Montreal also faced challenges in following certain project management disciplines, such as:

1. **Change management:** The HEC Montreal CRM project involved significant changes to the organization's processes, systems, and culture. HEC Montreal faced challenges in managing these changes, particularly in terms of ensuring that staff was adequately trained to use the new system and adapting to the changes in the organizational culture.
2. **Monitoring and controlling project progress:** While HEC Montreal developed a detailed project plan, there were challenges in monitoring and controlling project progress. For example, the project team faced challenges in accurately tracking project costs, which resulted in project budget overruns.
3. **Agile project management:** HEC Montreal's CRM project was not managed using an agile project management approach, which may have been beneficial given the project's complexity and the need for frequent communication and collaboration with stakeholders. An agile approach may have facilitated more flexibility in project execution, which could have helped address some of the project's challenges.

What practices noted in the case do you believe would be helpful in your professional life as a project manager and why?

Here are three practices noted in the HEC Montreal CRM project case that I believe would be helpful in my professional life as a project manager: (with reference to my architectural field)

1. **Involve stakeholders in the design process:** In the HEC Montreal CRM project, end-users were involved in the design process to ensure that the system met their needs and requirements. In the architecture field, it is important to involve all stakeholders, such as clients, building owners, and end-users, in the design process to ensure that the final product meets their needs and expectations. By involving stakeholders early in the process, potential issues can be identified and addressed before construction begins, leading to a more successful project outcome.
2. **Clearly define project scope and goals:** Clear definition of the project scope and goals is crucial to project success in the architecture field. This ensures that all stakeholders have a shared understanding of the project's objectives and can work towards achieving them. By defining the project scope and goals clearly, project managers can ensure that the project is delivered within the agreed timelines, budget, and quality standards.
3. **Emphasize effective communication:** Effective communication is essential for project success, and this was demonstrated in the HEC Montreal CRM project. The project team, vendors, and end-users effectively communicated throughout the project, facilitating collaboration, risk management, and issue resolution. In the architecture field, effective communication is critical for ensuring that all stakeholders are informed and engaged in the project. Project managers should prioritize regular communication with stakeholders, such as progress updates and issue resolution, to ensure that everyone is aligned and informed throughout the project lifecycle.
4. **Utilize project management tools:** In the HEC Montreal CRM project, the project team utilized project management tools to track project progress and manage tasks. The tools enabled the team to identify potential issues early and implement corrective measures, leading to successful project outcomes. In the architecture field, project managers can use project management software tools to track project progress, manage tasks, and collaborate with team members. This ensures that the project is delivered on time and within budget, while maintaining high quality standards.
5. **Manage project risks proactively:** In the HEC Montreal CRM project, the project team identified potential risks and developed mitigation plans to manage them proactively. By anticipating and managing risks, the project team was able to minimize potential negative impacts on the project, leading to a successful outcome. In the architecture field, project managers can adopt a proactive approach to risk management by identifying potential risks early in the project and developing mitigation plans to manage them. This helps to ensure that the project is delivered on time, within budget, and with minimal negative impact on the project outcome.