



PROJECT MANAGEMENT

FRAMEWORK REPORT

CLIENT

Organization X

PROJECT

CRM Implementation

PREPARED BY

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Agenda

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INTRO

Objective: Implement a functional CRM system within 12 months, with minimal disruption to current operations

Time Frame: 12 months **Budget:** \$1,000,000

TEAM COMPOSITION

IT project managers, software developers, cloud infrastructure specialists, sales and marketing stakeholders

SUCCESS METRICS

Successful integration with existing systems, user adoption rates, data migration accuracy, and project completion within scope, budget, and timeline

DEFINING FRAMEWORKS

A project management framework is a structured approach to planning, executing, monitoring, and closing projects. It encompasses tools, processes, and methodologies designed to ensure successful project outcomes.

KEY COMPONENTS

Processes: Specific steps such as initiating, planning, executing, monitoring, and closing.

Knowledge Areas: Domains like scope, cost, time, quality, risk, and communication management.

Tools and Techniques: Templates, software, and metrics for tracking progress and ensuring quality.

DEFINING FRAMEWORKS

VALUE

Standardization: Ensures consistent practices across projects.

Clarity: Outlines clear roles, responsibilities, and deliverables.

Risk Mitigation: Identifies and addresses potential risks early.

Efficiency: Optimizes resources and time through structured workflows.

Alignment: Ensures alignment with organizational goals.

Using a project management framework for the CRM implementation at Organization X will make it easier to get everyone on the same page, whether it's IT, developers, sales, or marketing. It'll also help smoothly integrate the new CRM with what's already in place, so there's less disruption to day-to-day operations. This approach means we can keep track of key success metrics like how quickly users adopt the system and how accurately data is migrated, all while staying on track with the budget, scope, and timeline.

It's a great way to ensure everything runs smoothly and helps the organization grow.

COMPARING FRAMEWORKS: PRINCE2 & SCRUM



COMPARISON: PRINCE2 & SCRUM

	PRINCE2	SCRUM
STRUCTURE	A process-driven framework emphasizing detailed planning, predefined stages, and documentation.	An Agile framework with iterative sprints (2-4 weeks) focusing on delivering incremental value.
FLEXIBILITY	Less adaptable due to its structured nature; best for projects with stable requirements.	Highly adaptable, ideal for projects with evolving needs and stakeholder feedback.
TEAM DYNAMICS	Clearly defined roles (e.g., project manager, team members), with top-down management.	Emphasizes self-organizing teams, with key roles such as Scrum Master, Product Owner, and Development Team.
RISK MANAGEMENT	Comprehensive risk registers and regular assessments.	Addresses risks dynamically within sprints, focusing on real-time problem-solving.
SUCCESS CRITERIA	Success is measured against predefined scope, timeline, and budget.	Measures success through customer satisfaction and delivery of functional increments.

APPLYING FRAMEWORKS:

SOLUTIONS FOR
ORGANIZATION X
**& IMPLEMENTING
SALESFORCE**



APPLICATION: PRINCE2

4.1

PLANNING

01

Develop a detailed project plan outlining specific stages for Salesforce system integration, migrating customer and sales data, and delivering user training sessions for the sales and marketing teams.

COLLABORATION

02

Implement structured communication channels, like bi-weekly progress meetings, between IT project managers, developers, and key stakeholders to ensure alignment on the integration strategy.

RISK MANAGEMENT

03

Keep a comprehensive risk document to track potential challenges, such as issues with Salesforce API connections or unexpected downtime during data migration, and establish mitigation strategies.

DELIVERY

04

Document the integration process, including system configurations and user manuals, and conduct a post-implementation review to evaluate success metrics like user adoption and data accuracy.

APPLICATION: SCRUM

PLANNING

01

Break the project into sprints, such as a two-week sprint focused on Salesforce database setup, another on custom field creation for sales reporting, and a third on integrating Salesforce with existing marketing tools like HubSpot.

COLLABORATION

02

Hold daily standups with the implementation team to discuss progress, resolve blockers (i.e. debugging integration errors) and keep everyone aligned on sprint goals.

RISK MANAGEMENT

03

Use sprint reviews and retrospectives to spot issues early, like challenges in syncing Salesforce with older systems, and adjust the approach dynamically to keep the project on track.

DELIVERY

04

Deliver working CRM features and Salesforce functionality incrementally, ensuring continuous feedback and improvement.

RECOMMENDATION

We recommend using Scrum as the preferred framework.

IT projects are dynamic! Scrum will provide the flexibility needed to adapt to any changes or challenges that come up during the CRM implementation. Its focus on incremental delivery will help catch any integration issues early, reducing potential disruptions.

RECOMMENDATION

Scrum promotes collaboration and keeps stakeholders involved throughout the process, ensuring that the CRM system aligns with the company's needs and goals.

With Scrum, I'm confident Organization X will meet its objective of a functional CRM system within 12 months, while staying on track with the \$1M budget.

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PHOTOS:

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