



“Seeing errors in a written document is hard. Eliminating errors in the XSOL visual model was easy because it offers a language everyone understands...”

Ryan Walker, CRM Consulting Services Manager, MicroChannel

Implementing CRM – right on time

NDS is the national industry association for disability services, representing over 770 non-government organisations. Collectively, its members operate several thousand services for Australians with all types of disability. NDS's members range in size from small support groups to large multi-service organisations, and are located in every State and Territory across Australia.

NDS has a National Secretariat in Canberra and offices in every state and territory. The National Secretariat allows for co-ordination of the respective state and territory bodies at a federal level, while the latter focus on state issues surrounding disability. The organisation as a whole is governed by a national Board which includes the elected Chair from each state/territory as well as representatives elected directly by members.

Here's the story of the 4 key people involved in the project.

NATIONAL DISABILITY SERVICES:

Chris Giles - Assistant Chief Operating Officer
Belinda Allen - Membership Development Manager National

AUSTRALIAN STRATEGIC PLANNING PTY LTD: Richard Dougan - Managing Director

MICROCHANNEL:

Ryan Walker – CRM Consulting Services Manager



CHRIS GILES – The Assistant COO

XSOL was the enabler which focused us during the scoping stage of our Microsoft Dynamics CRM and SharePoint project. This helped us to reduce both the time it took to workshop each process and the amount of rework. As a result we had a final document ready for each business area after four 2-hour sessions. Other CRM/ERP implementations I've been involved in took 3-4 full days.

Use of XSOL, ensured that there was no rework required of the business processes as a result of “gaps” in the process design.

It enabled us to review and re-engineer processes which we had identified required change, as well as designing a new business model and having it incorporated in the CRM system ready for the business to be launched. Process flow changes identified during the scoping phase only resulted from recommendations regarding the functionality of the CRM software solution.

In particular, the tool reduced errors by eliminating the guess-work for the CRM vendor, MicroChannel.

BELINDA ALLEN – The Membership Development Manager

We now have a clear way to visualise exactly what we want and how we do it. To give an example – when someone is taking leave we straightaway see how things will be covered, and by whom.

Another benefit for us as a team is that from the process model we can see where decision points are and where senior management may need to be involved. This enables us to better manage our business risks.

The visual process model created by XSOL easily demonstrates for each process:

- ✚ how it works;
- ✚ why it's so important to follow it; and
- ✚ what the impact will be if it is not followed.

Being able to see the “why” has definitely changed people's behaviors in our organisation. They follow processes better because they want to, not because someone told them to, and this helps us be more efficient in what we do.

RICHARD DOUGAN – The Consultant who modelled NDS

We used XSOL to help clarify and specify the client's requirements, which is such a critical part of a CRM or ERP implementation. Anyone in IT will tell you that errors in the requirements phase are hardest to fix, and the ones most likely to derail projects.

We work shopped the processes identified for the CRM implementation using XSOL, and this included a detailed business process re-engineering phase. The result: NDS focused on what they really needed from a CRM system.

The benefits of XSOL for NDS were - it gave everyone the same picture of what the CRM needed to do, reducing the scoping time; and it simplified the re-engineering process.

Many organisations do not avail themselves of the opportunity to improve their processes when implementing new application systems. On this project, NDS had time to improve their processes and implement on time on budget. XSOL assisted this with reduced workshop time, immediate production of Word and web output of the processes, ability to re-engineer and update the documentation using XSOL visuals, documentation and process updating. Cutting weeks and months from project specification and scoping significantly reduces the potential for human error.

With XSOL producing immediate visual representation of processes during workshops the need for multiple workshops is greatly reduced with much higher accuracy and more detailed outcomes. We described the various processes in an XSOL model, which NDS then reviewed and/or re-engineered. We then updated the model before they gave it to the CRM vendor. This way the instructions to the CRM vendor about what a client wants are explicit.

Normally a CRM vendor will not know a client's business and the client not know the CRM software. It's like two blind people deciding where the bulls-eye is before shooting. For this project it was like having one party giving the other precise coordinates of where to aim.

The result is a much-reduced margin for error, because a whole layer of discussion and misunderstanding goes out of the project, as does the chance for scope creep, changes and the additional costs for extra work. That makes for better project outcomes.

A big part of the success of this project was NDS staff having a very clear knowledge of their processes, and this combined with XSOL's process visualization generated a CRM project so smooth that it felt like "no big deal". Whereas normally, the CRM/ERP implementation world is racked with pain. So, having a 'painless' project is a really significant outcome.

I'd recommend XSOL for any client who wants an exciting CRM application after it has been implemented who doesn't want a "painful" CRM/ERP implementation – they simply want it to arrive on time, within budget, and delivering great things for their staff and customers.

RAYAN WALKER – The Consultant who implemented CRM

We had not seen XSOL before but were immediately impressed that it provided a significant time-saving for us as the normal 1-2 months of functional requirement scoping leg-work was reduced to 2 weeks by having the XSOL process mapping visuals and documentation.

This was a 50-75% time-saving that paid for the mapping project immediately. But the benefit didn't stop there. XSOL also increased scoping accuracy and reduced the amount of review required.

The benefits were possible because we all had a singular understanding of the client's requirements, which we could see visually. We didn't have to go through the drawn-out process of interviewing a whole lot of different people, which is high-stakes if you get something wrong and therefore inaccurately describe the client's requirements – meaning you could build the system incorrectly.

We'd bypassed a big area of risk in a traditional implementation, replacing it with something more robust. That's because we weren't relying on information gathered from sitting down with different people in their company and going through the process of "ask questions, clarify, cross-reference, check and iron out contradictions".

This is the big challenge for CRM/ERP vendors – understanding the business they are putting the software into. As Chris at NDS has commented, XSOL helps remove a lot of the guess-work for the CRM-vendor.

XSOL gave NDS an opportunity to discuss their requirements internally - the chance to say, "hang on a minute – does that process make sense? Do we really want a system replicating that – or would we be better to fix that process now so that we replicate something that'll save us time and money?"

Clients don't normally have this luxury. There's no time, and consequently a real risk that once the champagne has been drunk at the end of an implementation, people have the system they asked for but it's processes are inefficient, duplicated or even redundant. This is because normally client requirements are often hazy until they are documented.

With NDS, once their processes were down as a visual, other departments such as Finance could also say whether a process was correct or made sense. You could say that XSOL helped us "lift the haze".

This visual model also gave them the opportunity to eliminate errors upfront rather than down the track (where it takes a lot more time and money to fix).

Seeing errors in a written document is hard. Eliminating errors in the XSOL visual model was easy because it offers a language everyone understands. The model can be reviewed and revised again and again without people getting fatigued or confused.

When we did pick up an error during the review process, the visual model made it easy to go away, interrogate the requirements, and resolve it.

To find out how XSOL can benefit your business visit www.xsol.com or contact enquiry@xsol.com