

## Organizational maturity

- How it affects
- Dynamics 365/PowerPlatform
- implementations

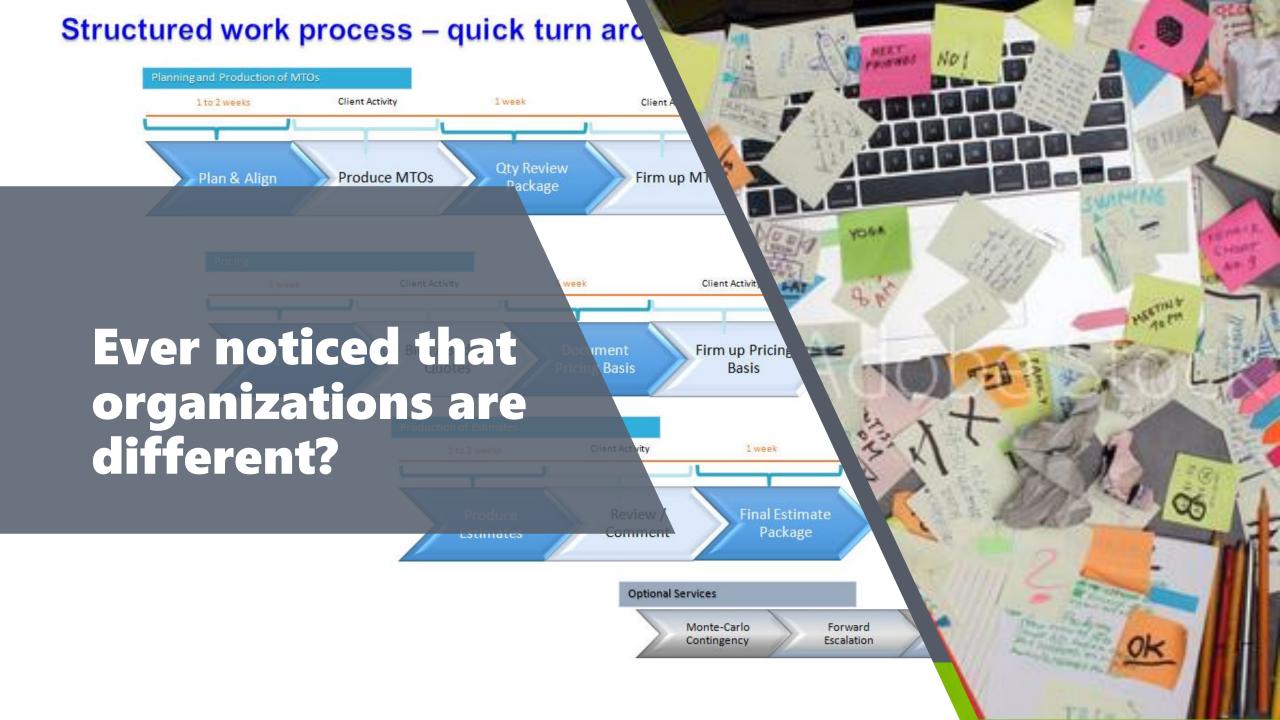


## Speaker



**Gustaf Westerlund** 

CIO, MVP, Founder CRM-Konsulterna CRMUG Medic, Founder Swedish Chapter





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6	Anderson, Jane	ABC Corp	Sales Manager	222-656-7890	busl@abccorp.co	\$	10,000	1/25/2013	Sample contact log wing cell comments.			Website
- 7	Smithers, Joe	ACME	Business Dev.	111-234-5678	acme@acme.com	\$	4,500	1/27/2013	Sample canca	Email		
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21 22 Instructions: 1) Enter the Nam

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1) Enter the Name, Company, Work Function, Phone and Email for your customers

2) Enter the Lead Source to help you evaluate the effectiveness of your marketing

3) Enter the Estimated Sale amount to help you evaluate the importance of the sale

4) When contact is made, enter the date in the Last Contact field and enter notes using cell comments or the optional ContactLog worksheet

 $5)\,\mbox{Plan}$  the next contact by listing a Next Action and updating the Next Contact date

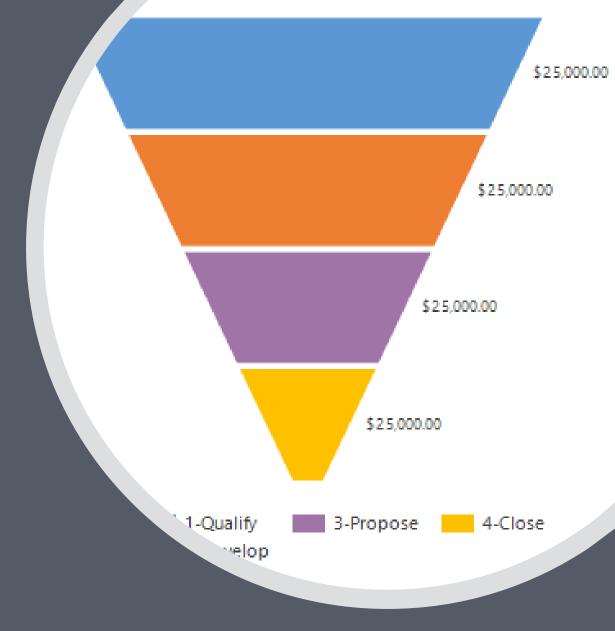
6) Update the Lead Status when the customer becomes more or less likely to accept your offer

# **Ever heard something like this?**

 No, John works one way and George another – we need to be flexible

# Ever heard something like this?

• We have set common processes for sales. It is interesting! Our managers usually click around to get some insights

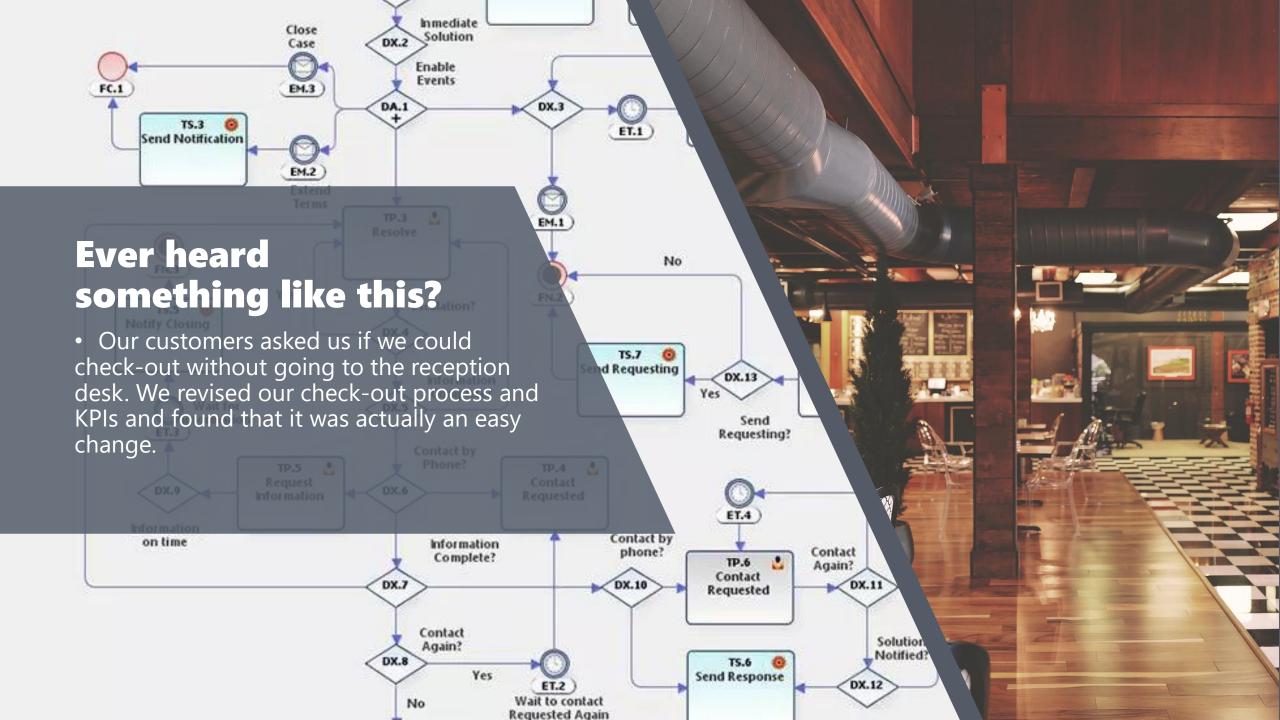




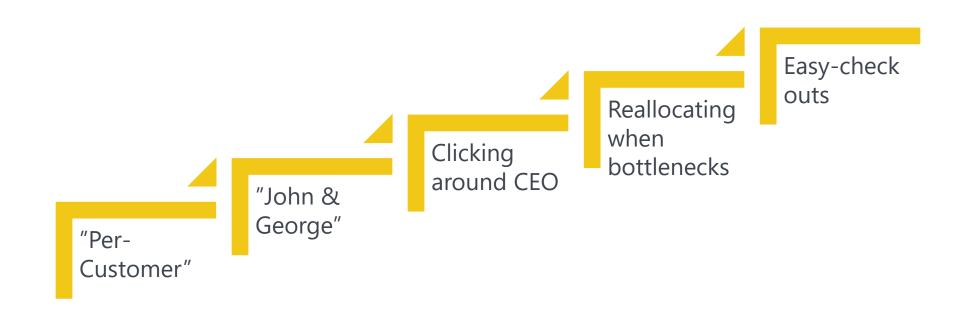
### Key Performance Indicators



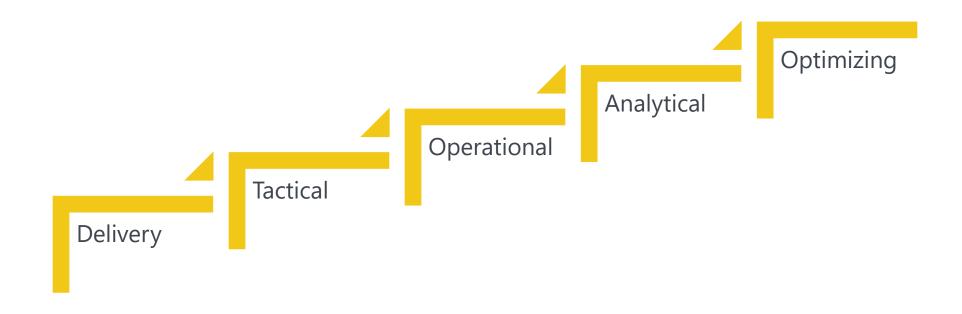
• We have a controlled and measured processes with set KPIs. We can quickly act if there are bottleneck to reallocate resources.



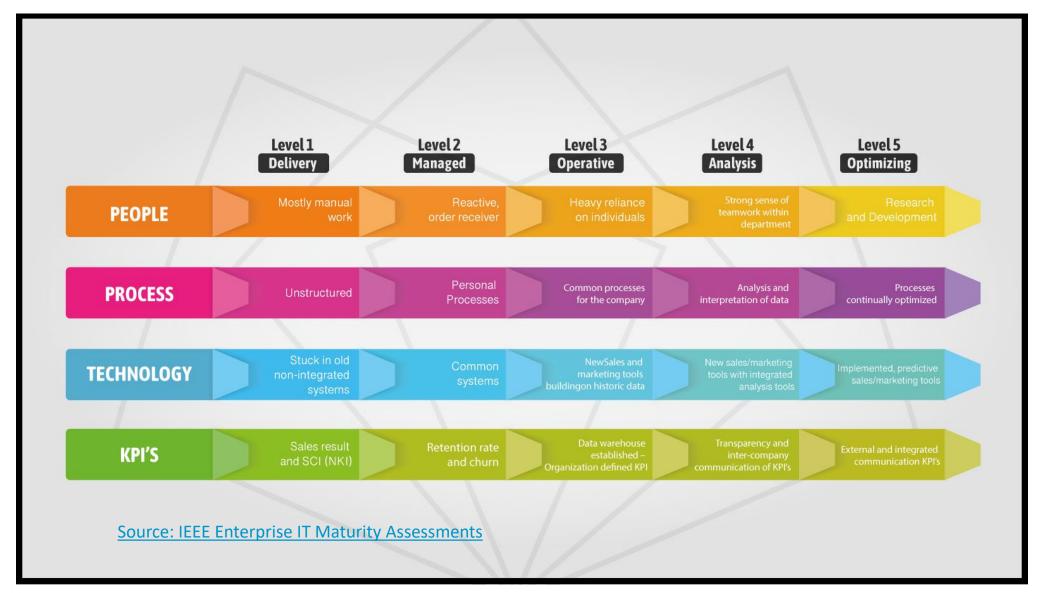
#### More mature perspective!



#### Named after focus



#### Divided into different areas





#### **Maturity level: Delivery**

- No common fixed processes, even per person
- Focus on
  - Basics
  - Harmonizing way of working
  - Getting people to use system at all productivity
  - NOT advanced features (AI) and myriads of fields
  - Be careful of complex terminology like "process"
- Good to offer fixed products with built in processes
- Set responsible person begin defining "Ways of working"
- Effect of CRM implemenation is low but <u>can</u> cause maturity growth





#### **Maturity level: Tactical**

- Fixed processes per person/small groups
- Focus on
  - Harmonizing way of working
  - Write down ways of working & how to measure success
  - Anything that can be automated? Start simple -> get traction
  - NOT advanced features (AI) and myriads of fields
  - Be careful of complex terminology like "process"
- Identify users/groups that are successful expand
- Leverage of CRM is low but easier to get acceptance



#### **Maturity level: Operational**

#### Organization should have

- Defined processes
- KPIs
- Assigned responsible people

#### Focus

- Question processes might be based on old tech
- Discuss how to measure success/failure of processes
- How to be more data driven?
- Al and advanced features can have some effects but needs to be connected to way of working
- Probably already has CRM
- Effect of new CRM medium





#### **Maturity level: Analytical**

- Already rather advanced CRM usage
- Communicate vision/Expects advanced features
  - Probably reason for choosing Dynamics 365
     CE/PowerPlatform
  - Important to understand long term vision
- How to expand data driven decisions? Use of Al?
- Use of PowerBI for advanced KPI measurements is required



#### **Maturity level: Optimizing**

- Highly advanced organizations
- Expect high level technical and business skills from partner at optimizing level
- Business is constantly adapting and processes changing based on internal R&D
  - All systems and partners have to support this pace of evolution





## The more mature = more data driven Data driven decisions = better business

Companies using data driven decision better

- Reach sales targets
- Get Management support
- ROI on CRM

And companies start to realize this according to research



#### Conclusion

- The more mature an organization the more effect of a CRM implementation
- -> the more mature an organization is the more willing they are at spending more on implementing more advanced technology
- Organizations that mature will see an exponential effect on the technology implementations
- Implementing CRM on very low levels (1) is hard. Requires definining processes *for* organization. Not asking for requirements. Recommend using management experts to mature them first.



#### Recommendation

- 1. Asses where customer is
- 2. Ask customer where they think they are
- 3. Ask customer where they want to be
- 4. Compare the results and discuss with customer
- 5. If too low, use management experts to mature customer



## **Questions?**



## Thank you for attending!

Please complete your survey





# DYNAMIC COMMUNITIES