

Customer Relationship Management Status Assessment

The self-scoring rapid evaluation tool identifies issues that could impact your project. You will gain valuable insight, regardless of your project completion status. To use the assessment, respond to each statement with a check mark indicating the degree of agreement closest to your current situation.

Assessment Criteria	Degree of Agreement				
	Strongly Agree	Agree	Not Yet	Disagree	Strongly Disagree
Executive Direction					
<ul style="list-style-type: none"> Senior Management recognizes the need to support the CRM initiative and they are committed to providing the time and resources required for success. 					
<ul style="list-style-type: none"> A vice president is the chief sponsor for the initiative and an "Executive Steering Committee" has been formed to guide and support the initiative. 					
<ul style="list-style-type: none"> Management coaching is based on the sales and service process "Models". 					
Definition of Needs					
<ul style="list-style-type: none"> The goals and objectives of the CRM initiative are linked to achieving specific organizational strategies. 					
<ul style="list-style-type: none"> The users have direct input to System Requirements and a have reviewed the system interface. 					
<ul style="list-style-type: none"> The users are enthusiastic about the new system. 					
<ul style="list-style-type: none"> A list of software evaluation criteria was used as to help determine the vendor selection process. 					
Processes					
<ul style="list-style-type: none"> Target sales and customer service process "Models" are well documented and training programs are based on these "Models". 					
<ul style="list-style-type: none"> Specific and measurable criteria have been established to evaluate the success of the pilot, the readiness for rollout and performance against stated objectives 					
<ul style="list-style-type: none"> A process has been developed and communicated to the user community regarding ongoing system enhancements and establishing priorities. 					
Project Management					
<ul style="list-style-type: none"> The primary user group's Critical Success Factors are known and communicated organization wide. 					
<ul style="list-style-type: none"> All Stakeholder Groups have been included in the project team from the start of the project. 					
<ul style="list-style-type: none"> The status and execution of the project will be communicated to the users on a regular basis. 					
Budget and On-going Resources					
<ul style="list-style-type: none"> Adequate budget is available to implement and rollout the system based on results of the pilot system. 					
<ul style="list-style-type: none"> A help line is in place with proper escalation procedures and is available when the users need it regardless of time zone. User Training is ready. 					
<ul style="list-style-type: none"> Adequate budgeting has been established to support upgrades and maintenance of the system. 					

What is the current status of your CRM Initiative? (Check One)

<input type="checkbox"/> Starting in 3-6 Months	<input type="checkbox"/> Project Planning Phase
<input type="checkbox"/> Development Phase	<input type="checkbox"/> Implementation Phase

Instructions: Total the responses for each column on page 1, then add the totals together to get your overall score. Recommended actions are listed beside the score ranking. Looking at you score by section will also help identify areas for potential improvement.

Assessment Calculations

Assessment Instructions	Degree of Agreement				
	Strongly Agree	Agree	Not Yet	Disagree	Strongly Disagree
A: Total the number of responses in each column of the Degree of Agreement Matrix on Page 1					
B: Risk Weighting Factor	0	1	2	3	4
C: Multiply the Degree of Agreement column totals in line A, by their by corresponding Risk Weighting Factor in Line B and write the totals on this line (Line C).					
D: Add all cells in line C, write result for Overall Score This figure represents the Readiness Gap for Customer Relationship Management Initiatives.	-----				
E: Refer to the "Current Status of your Relationship Management Initiative" and add its impact factor. Starting in 3-6 Months – Add 0 Project Planning Phase – Add 2 Development Phase – Add 4 Implementation Phase – Add 8	-----				
F: Add Line D and Line E to obtain the "Overall Project Risk" for your CRM Initiative.	-----				

If your Overall Score was between:	Diagnostic and Recommended Course of Action
00 – 12	The risk of your project's failure is low. Continue to evaluate the project on an ongoing basis and document where there is an acceptance gap. This information will permit continual improvement the CRM system in a following phase.
13 – 30	Your CRM Initiative is at a cautionary level of risk of success or failure. Undertake a Gap Analysis of the areas of disagreement against your Project Plan, and re-evaluate your project objectives or task order.
31 – 48	Your project has a high risk of failure or it could provide disappointing results. Evaluate areas of disagreement against your Project Plan and your Business Plan. You should revise your project plan, and its objectives.
49 – 64	Proceed with extreme caution! Your CRM project has a grave risk of failure; a detailed CRM project assessment is strongly recommended.

For a detailed analysis, contact Robert Gillelan at 416.569.9688