TimeLinx™
Project & Service Management

2020 CRM "Quick Win" Implementation Program

The TimeLinx implementation philosophy revolves around quick, successful adoption. We have designed a standardized **"Quick-Win"** program for CRM to achieve this goal and minimize risk. Portions of this program may be delivered on-site or via remote services.

DELIVERABLES

Installation and configuration of CRM

- Work with your IT staff to review and prepare the Server environment
- Install and configure the CRM's core functions
- Install and configure e-mail integration.
- Identify Account/Company and Contacts data from ERP or other sources that will need to be imported (actual data import is an al-a-carte service)

Conduct System Design sessions with implementation team

- Create the Overall Goals and Objectives of the project
- Identify your current systems and processes.
- Begin modeling how Sage CRM should function and screen changes needed
- Development of the Company, Person and Opportunity entities
- Discuss optional integration and process flows for CRM with external applications such as an ERP (accounting) system.

Create Development server environment

- Perform System Configuration tasks and begin to modify screens as appropriate per System Design sessions
- Create and train a small team users to test the system

Administrative Training

- Conduct Administrator Review training sessions to review system modifications and common administrative functions (up to 1 day)
- Review User Setup Configurations, Security Configuration, Screen and Field Customizations, Email Configuration, Dashboard Creation and other common administrative functions
- Identify Reports that are needed or changes to existing reports (actual development or customizations of reports is an al-a-carte service)

Development review and final changes

- Test each facet of the system that was discussed in the System Design sessions
- Select a small group of users to test the system with "Day In the Life" scenarios
- Review feedback from the users and make changes as needed

Final Configuration and "Go-Live"

- Meet with the Team for final testing and "last-minute" configuration changes
- Port Development system to the Production server
- Make final configuration changes needed
- Import final data as needed for Production (actual data import is an al-a-carte service)

Client Responsibilities

Our successful implementations have a few common denominators which we are designating as your responsibility to the project.

- Designate one user as the Project Leader
- Create a small implementation team with at least one user from each discipline that will be utilizing the system
- Take time to participate in the Pilot phase of the Project
- Have the IT staff available to us for technical network assistance
- Create an ability for us to remote into the system
- Be dedicated to creating a "CRM culture" within the organization

Our experience with successful implementations is that our "Quick-Win" program gives you the ability to be up and running on a CRM system at a relatively low initial cost while achieving quick adoption among your users.

We strongly suggest that the first steps be performed on-site in a private Rquirements Workshop. Our experience has shown that on-site meetings at this stage help create a better synergy for the project and are significantly more efficient than remote meetings. Identification of who should be present will be discussed. We will learn about your company and you will learn about Sage CRM. During this time, we will create a defined project scope and timelines, identify workflows, discuss integrations, objectives and more.

Calendar duration will be dependent on your workload, company and staff conflicts, and dedication to the project. Typical deployment of this program ranges from 45-60 days.

Please contact us with any questions to sales@timelinxsoftware.com.