

Foundation for a change to success

CRM is a business strategy that blends processes, people, and technology to help you attract sales prospects, convert them into customers, and keep existing customers satisfied and loyal.

Is your existing CRM system unable to meet your expectations and current needs? CGI can help you by using Salesforce to transform your organization into a successful business machine.

Challenge

With complex business processes, rapidly changing technological possibilities and highly demanding and educated customers, it is challenging to live up to expectations. Your basis for success is your information structure. Where do you begin if you want to keep up with competition? What are the opportunities and threats of implementing a new CRM system based on a different information structure? How do you specify your needs and requirements? How big of an impact will such a project have on your organization and at what pace is it capable of handling the change?

What we do

CGI can help you answer these questions through a couple of steps. The first being interviews and workshops to gather an understanding of your situation. Then, we analyze the information using our collective experiences to come up with a framework, a project foundation and a proposed solution, tailored to your needs.

Our approach:

- Gain a full understanding of the challenges you are experiencing as well as the context in which you function
- Establish a project foundation
- Executive level & User agreement on proposed solution



CLOUD ALLIANCE
PARTNER



BENEFITS AND BUSINESS EFFECTS

CGI can help you shift your organization into the next gear to be prepared for your future.

- 360° analysis of current situation
- Agreed upon game plan
- Engaged organization
- Future proof work processes
- Kick-start ready

FOUNDATION FOR SUCCESS-ANALYSIS: PRE-STUDY

- **Process Modelling**

The first step of the Pre-study is to understand how you work today and how you would like to work in the future. The focus is on the main business processes that lie within the scope of the CRM implementation. This is done in a workshop or interview format.

- **Requirement Analysis**

This reflects the process of gathering requirements for the CRM system as well as the new way of working. Employees are to openly discuss the requirements in a broader perspective. This secures the scalability and potential future evolution of the implementation.

- **Information Model**

An information model is a graphical overview of the information the CRM system will contain, including relationships and structure of the information objects. The information model is updated as functionality is added and the system grows, but the core structure remains.

- **Project Plan**

Once the process models, the requirement analysis, and the information model are in place, the project plan can be set up. It is a formal, approved document to guide both project execution and project control. The project plan also contains a proposed solution roadmap for a suggested step-by-step implementation, including the system roll-out and end user training. A proposal with the time frame, the project scope, and a price is included.

- **Change Management**

This is integrated in the project plan and explains the key changes in the organization when it comes to way of working, thinking, systems, and processes.



WHY CGI

Founded in 1976, CGI is a global IT and business process services provider with 69,000 professionals delivering high-quality business consulting, systems integration and outsourcing services.

- High-end IT and business solutions
- Covering all IT and business consulting areas
- Deep industry knowledge
- Local presence with 35 offices in Sweden
- Global reach with 400 offices in 40 countries
- Certified, experienced and dedicated Salesforce consultants committed to deliver excellence
- Focused on your growth and value creation

For more information about CGI, visit www.cgi.se

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