can we talk?

HELP WANTED

The success of your SFA project may depend on the consultant who advises you. By Barry Trailer

YOU'VE heard all the tales of woe associated with failed SFA projects. Stories abound of vendors over-promising and underdelivering, or of sales VPs who had no clearer vision than "We gotta automate." But there is usually another player on the stage who, while often absent in the story of woe, is visibly present when the tale is being played out: the consultant.

Perhaps because consultants are not around when post-project recriminations begin, they occasionally become grist for the humor mill. These chestnuts may sound familiar: "The definition of a consultant: A person who'll borrow your watch to tell you what time it is, then charge you fifty bucks." Or my personal favorite, "What services do consultants perform? Walletectomies."

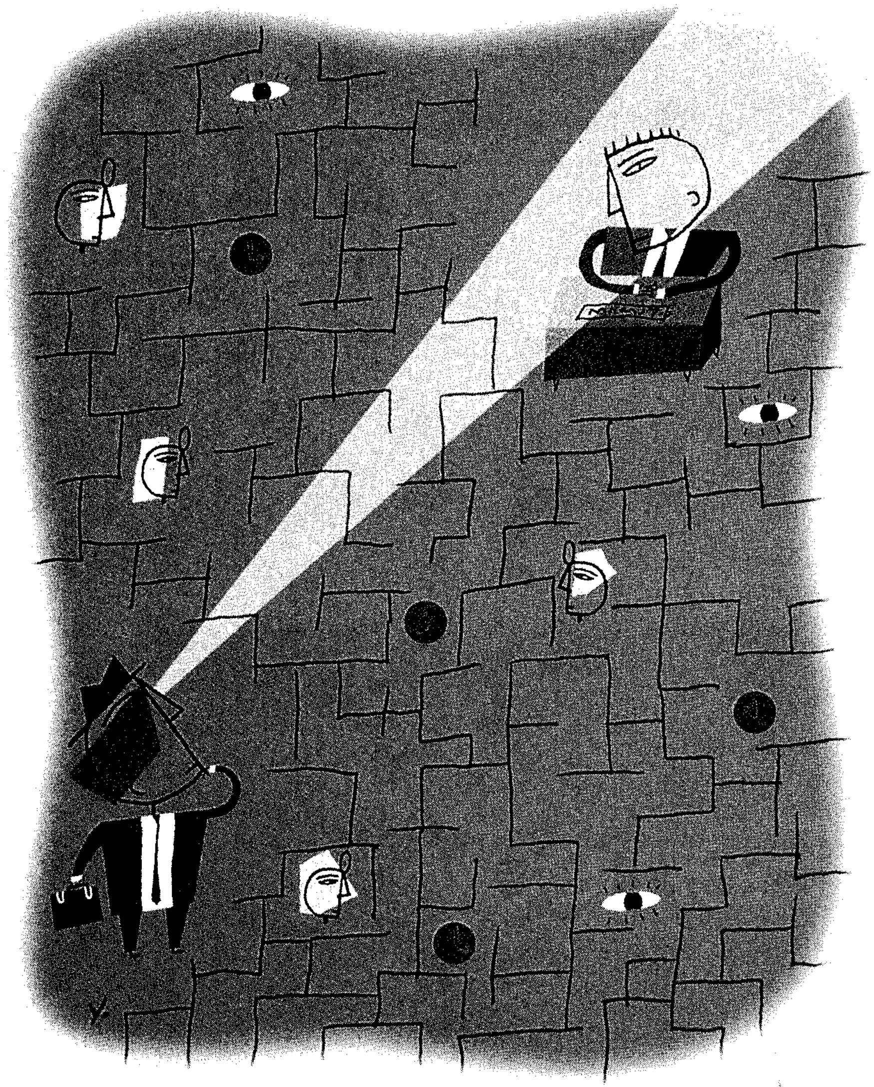

Illustration by James Yang / SIS

Joking aside, when you are ready to buy an automation package, can a consultant help, or do the jokes, in fact, contain a grain of truth? And if consultants can help, how? In typical consulting form let me answer these questions with the most common and accepted of all consultant's phrases: It depends. It depends on where you are in your project and what problem(s) you want to solve. Consider how these typical problems muddy the client/consultant waters:

Lack of clarity. CRM projects and client-consultant relationships often get off on the wrong foot because of the lack of a clearly defined problem. "We need to get automated," "We need to get our people more productive" and "We want to share information to become more customer centric" are vague but common justifications for automation initiatives.

Consultants further confuse the situation. "Yeah, we've done that kind of work before," may or may not mean the consultant you're speaking to has actually done the kind of work you envision. Are they lying? Not really, but there's so much wiggle room in most early conversations that no one needs to get down to serious deception. ("What's your definition of 'is'?") Of course, the central questions are why hire a consultant and what do you want the consultant to do? The answer to the first question is pretty straightforward. The only reasons to hire a consultant are that you lack the time, expertise and/or credibility to do it yourself.

In today's hyper-paced environment speed is key. Getting someone in who's been through similar projects before, who can lay out a game plan, identify potential potholes and speed bumps and provide direction to an amorphous project represents genuine value. However, speed simply for the sake of speed often channels projects in the wrong direction, leading to the lament, "There's never time to do it right, but there's always time to do it over."

Where to begin?

As a rough framework, CRM consulting falls into three broad, consecutive areas: (1) initial process work, (2) developing priorities and (3) implementation. While there are few fixed stars to guide by in the CRM universe, these three areas are fairly firm.

"Get your processes straight, *then* automate" is an idea that has become axiomatic by now. Automating broken processes only creates more problems and dissatisfaction faster. Then, assuming you have a reasonable fix on your processes, figure out which ones to automate and in what order. And finally, decide which software application best addresses these items and implement it.

This is not to say that firms don't do things out of order. One example is a consultant being brought in and told, "We've had Vantive in our Customer Service and Support for a year and are now going to roll it out to Sales and Marketing." While having a consistent end-to-end solution is inherently attractive, predetermined packages may not always emphasize the functionality or utility in line with your sales priorities.

Other problems arise as well. If you are new to the game, how do you find a consultant? There are no central resources, but there are various possibilities. Even if you haven't already selected a package and are going to do things in order, you can contact CRM vendors and ask which consultants they're familiar with. I, among countless others, do presentations at conferences (*e.g.*, DCI's CRM Conference & Expo, Ziff-Davis) to get exposure. Consultants also write articles and are listed in resource guides—ISM's *The Guide* and Rich Bohn's *www.sellmorenow.com* are two examples. Rich is a regular contributor to this magazine and runs an active Web site with a wealth of current and relevant CRM information. Another columnist is Jim Dickie of the CSO (Chief Sales Officer) Forum. The CSO Forum offers high-level coaching and can provide names of consultants who do specific work in each of the three project areas.

You can also talk to customers, prospects and suppliers and ask whether they've automated and, if so, which consultants they used. Finally, there are also large consulting firms, known as the "Big 5" (Andersen, KPMG, PricewaterhouseCoopers, Deloitte and Ernst & Young).

FOR MORE INFORMATION

CSO Forum, Jim Dickie, jimdickie@cso-forum.com or call (303) 530-6930. This group of well-respected professionals offers workshops on SFA/CRM and Marketing Automation, a guide to other consultants and issue-based white papers.

Denali Group, Rich Bohn, richbohn@sellmorenow.com or call (425) 392-3514. Unvarnished reviews of SFA/CRM applications with a true sales orientation. Applications that have gone through Rich's structured review process and commentary on those that won't.

Getting There, Liz Seckler, lizs@ricochet.net or call (650) 591-7424. Consulting services and project management for companies wanting to organize their SFA/CRM search and have a guide who has been through it before.

ISM, Inc., Barton Goldenberg, www.ismguide.com or call (301) 656-8448. Publishers of *The Guide to Sales, Customer Service & Marketing Automation,* including a section on consulting resources. Also provide consulting services and have their own "10 Step Approach to Successful CRM Implementation."

Sales Science & Technologies, Tom Peterson, salessci@aol.com or call (301) 656-8448. An example of a consulting specialist who teams with other consultants in a consortium: The Taylor Group. Tom consults and conducts workshops on ROI models, identifying behavioral improvements that have high payoff.

Selling Advantage, Marilyn Dash, mdash@ix.netcom.com or call (650) 578-1560. An example of a consultant who can basically become part of your CRM team, beginning with needs assessments, through package selection and on to project management.

As you might imagine, not all of these consultants do all three kinds of work, and not all of them do them equally well. Ask them for specifics and for references. Also ask how the references they provide are similar to your initiative.

The Horse's Mouth

For finding and dealing with consultants, perhaps the best advice comes from the horses' mouths.

Liz Seckler of the CRM consulting firm GettingThere advises clients not to expect the moon from consultants. "Consultants can't fix all their [a client's] problems or make everything happen," says Seckler. "If the VP of sales talks of support but isn't involved in and committed to the project, a consultant can't fill that void." She goes on to say that vague and unrealistic expectations are difficult for everyone. "When clients say, 'Make the bad stuff go away and the good stuff happen,' and 'because you're here, it'll happen faster!' you're already off to a challenging start." Instead, advises Seckler, you and your consultant should have an early-level set meeting to agree on specifics, roles and responsibilities.

Marilyn Dash of Selling Advantage says most [prospective] clients have not prepared adequately for their consultants to be productive "the minute they walk in the door." This can be as simple, she says, as having a phone and desk for the person to work at to providing organizational charts, e-mail access and a system to work on. Another big mistake is having the consultant do clerical or other work that can be done by others.

You're talking about bringing in a key resource, maybe even a trusted advisor and guide. Picking one with whom you and your team feel some chemistry is important. Picking one who's familiar with the terrain you'll be crossing is critical. Listen for [actual] satisfied comments like, "She saved us from ourselves," and "Maybe we could've made it ourselves, but bringing these guys in was the smartest thing we ever did."

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