

**CLIENT:**

National non-profit organisation

BRIEF:

IT system overhaul

PROBLEM-STATEMENT:

The client had a partially functioning customer relationship management (CRM) platform with a supplier, but was dissatisfied with the:

- a) Development of the platform
- b) Lack of functionality of the platform
- c) Customer support offered by the supplier
- d) Ongoing relationship with the supplier

SCOPE OF THE PROJECT:

Using a client specific outcome focus, the mandate included the following goals:

1. Evaluation and analysis of prospective suppliers and their respective platforms
2. Reporting and feedback of findings and assessments to the client.

PROCESS:

Once the client had selected a supplier and development path, the process then offered project management of platform development with the new supplier which covered:

1. Scope creep mitigation (cost and timeline)
2. Development-time management
3. Developer interaction and engagement
 - Reducing the time-value cost of the client for the engagement
 - Utilising our knowledge of the client's inner complexities and objectives to ensure outcomes matched needs.
 - Utilising our asset's with systems knowledge to ensure the developmental aspects mirrored the customisation needed in the back end.
4. Pre-live testing of the platform
5. Assistance with legacy data transition to new platform
6. Go-live

The process from beginning to end covered the following aspects:

- Establishing a positive relationship between the CRM development supplier and the client (whether it was the same or a different CRM platform as a final outcome).
- A CRM platform developed and tested to meet the client's needs in terms of being fully functional as opposed to the legacy platforms limitations.
- Project timeline for go-live with a hard-line parameter for completion before the end of the client's financial year. It went live from day one of the new fiscal year.
- Assistance with legacy system data exporting, cleaning and importing to the new system.
- Further duplication dump-data assessment and cleaning assistance in order to retain any value in badly exported data.