

Why involve professional consultants in your CRM modernization project

Description

CRM technology, which helps companies consolidate customer data gathered across multiple touchpoints and provide a single source of truth for this data to sales, marketing, and customer service teams, has already become a vital element of enterprisesâ?? toolkits. But like any other software, CRM systems become obsolete over time, which can lead to lower performance, vulnerability to security breaches, and other issues.

To avoid them, companies can initiate CRM modernization, i.e. reworking the solution to improve its performance, functionality, security, and UX\UI. However, in many cases, companies lack necessary in-house competencies to plan and execute the modernization efficiently. To help address the competency gap and deliver meaningful CRM improvements, a company can involve professional IT consultants in its project.

In this article, experts from Itransition, a company providing CRM advisory services for 10+ years, highlight how IT consultants can help with different aspects of CRM modernization.

Conducting an audit of your legacy CRM system

A thorough assessment helps companies identify the most acute problems and risks associated with their legacy CRM systems, identify opportunities and areas for improvement, and define the most promising and cost-efficient modernization approach. Owing to their knowledge and experience, a professional CRM consultant can conduct an efficient and well-rounded legacy software audit.

Consultants typically begin by reviewing any available legacy system documentation to get a general understanding of â??â??the CRM toolâ??s characteristics, architecture, functionality, and dependencies. They then move on to examining the system itself in detail from different perspectives.

In particular, experts perform a performance analysis of the system to understand how it handles current workloads and whether it can withstand more as your business scales and

the number of users, transactions, and data increases. This is especially important for companies pursuing international expansion, where CRM systems must support a broader customer base, multiple currencies or languages, and region-specific compliance requirements.During the assessment, consultants use application performance monitoring tools to collect and analyze data on various system performance metrics, including error rates, response times, and resource usage.

Consultants also conduct a security assessment to identify security issues and vulnerabilities the legacy system has and understand whether they may pose a risk to the companyâ??s and customersâ?? data. At this stage, experts closely examine the data encryption mechanisms, user access rules, and the systemâ??s compatibility with modern cybersecurity standards. In addition, consultants can conduct vulnerability scanning to identify security risks and loopholes that may not be obvious at first glance.

Among other things, experts conduct interviews with business users (marketing, sales, and customer service departments), system administrators, and other stakeholders to gather their feedback about the legacy system, including its functionality, security, user experience, and other aspects, and to learn their wishes regarding the systemâ??s modernization. In addition, consultants can conduct a cost-benefit analysis to determine the cost of using and supporting the legacy CRM system, understand whether retaining or switching to a new system would be more profitable, and roughly estimate the possible cost and ROI of modernization.

Selecting the right CRM modernization option

After auditing the legacy system and analyzing the results, a consultant can help the company select the most appropriate and cost-efficient modernization path depending on the goals and needs of the organization, time and monetary constraints, and other factors. After all, there might be dozens of potential modernization approaches (i.e. rehosting, rearchitecting, rebuilding, or repurchasing a CRM system), and finding the right one can be challenging for decision-makers.

After defining and conceptualizing the right approach, a consultant can also help the company determine the optimal set of technologies to use for the modernization, varying from cloud platforms and data migration tools to APIs and container orchestration software. After tech stack selection and calculating the projectâ??s budget, a consultant can also prepare an actionable modernization plan to help the company modernize their CRM quickly and cost-efficiently as possible.

Supervising the CRM modernization process

Once the project starts, a consultant can also oversee the modernization process to help the company ensure it goes according to plan. If needed, a consultant can also guide the companyâ??s team on how to complete specific modernization activities to ensure successful project execution.

In particular, a consultant can instruct the project team on how to set up an efficient ETL pipeline and perform data migration, redesign the systemâ??s UI and UX, re-architect the solution and restructure its codebase in accordance with the new business logic, or split the complex legacy system into more lightweight and manageable containers.

A consultant can also guide the team on how to run different types of tests after the modernization and review the renovated CRM solution from performance and security perspectives to help the company ensure that the project has achieved its goals and the CRM system works as intended and is secure. A consultant can also help the team run user acceptance testing and gather user feedback to ensure system usability prior to launch.

Providing post-modernization support

CRM consultants can provide the company with assistance and support after the modernization project ends. For instance, they can provide the company with a tailored training strategy that would help educate business users and administrators on how to operate the new system, which is critical for effective user adoption. If necessary, a consultant can also guide the companyâ??s support team on how to monitor the security and performance of the renovated system on a regular basis, solve emerging issues, and provide patches and updates timely, helping to ensure stable and secure system operation.

Final thoughts

Even the most powerful CRM system inevitably becomes obsolete as the years pass, which can result in security, performance, and other issues, and owning such a system can become a burden. If you are planning to modernize your CRM system, consider enlisting the help of a reliable CRM consultant.

A consultant can evaluate your outdated system from different perspectives, identify the key problem areas, and define the right modernization strategy. They can also provide you with guidance and assistance throughout the modernization process itself and help you renew the CRM system in the most productive and cost-efficient manner.

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