Unanet CRM
Pre-Implementation

Implementation leaders and key stakeholders connect intentionally prior to implementation to tackle the following to establish a clear vision for your implementation and traceability to your business strategy. :

- ☑ Unanet CRM scope confirmation
- ☑ Governance expectations
- ☑ Business metrics definition
- ☑ Business development processes
- ☑ Current system environment definition
- ☑ Data conversion requirements
- ☑ System integration requirements
- ☑ User integration testing requirements
- ☑ User training requirements
- ☑ User permissions matrix development
- ☑ User guide requirements
- ☑ Change management requirements

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Unanet CRM
During Implementation

Dedicate a resource(s) responsible for:

- ☑ Key performance indicator requirements capture
- ☑ Business process / workflow mapping
- ☑ System and data governance development
- ☑ CRM system testing
- ☑ Systems integration testing
- ☑ Change management strategy development
- ☑ Communications strategy development
- ☑ Training materials development
- ☑ Training session coordination

For more information

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