CRM v2.0

Project Plan Updated	12/2/2021
Target Completion Date:	11/30/2022
Owner:	Michael Caturegli
Support Personnel	• Vani Ganti • Ben McKay • Jo Ann DelGatto • Jody Black • Glenn Leung • Joy Erven • Mike Caturegli • David Kodama
Scope:	This project will result in allowing SLA to provide world-class customer service to its members and constituents ("customers"). The main objectives are: • Create an org structure that streamlines processes for interacting with our customers. • Create efficient processes to interact and assist our customers. • Implement tools that provide SLA staff with customer-related data that assists them understanding root causes of customer issues and assist in continuous improvement. • Reduce response times and improve accuracy for customer issue resolution • Automate and improve cross-departmental interactions.
Significant Vendors:	• Salesforce • Vantage Point • Kikoda
Budget:	$900,000 ($150K - Integrating with RAPID/Website + $750K Actual Software Implementation)
What Line Item Will Project Budget Come From:	Capital Expense
Benchmark:	Successful implementation and in production use of high priority features of the CRM software product, including key integration points. High priority functionality such as: • Customer Dossier: Ability to aggregate various data elements from different systems onto one, "Customer Profile" window. High-level summary with ability to drill down to details screens or launch source system. • Ability to identify a customer when they contact the SLA based on the phone number or email address • Display Member participation on SLA Board and Committees, tenure, positions. • Display drill down the window for

	- Member contact logs (calls, emails, filing questions, who they talked to, when, why, etc.) - Member attendance logs: seminars, annual meeting, other events (RAPID) - Member affiliations to other associations (WSIA, CIWA, etc.), social media enrollments, Grassroots program participation. - Member category, primary lines of Business, education, annual transactions and premium, ranking. - Member use of SLA products and services. - Integration with RAPID/SLIP/Website/ Learning Center and identify the data elements and data Feeds (Customer/Individual Level) to the CRM Software. - Configuring and Implementation of the CRM software - Internal and External User Breakdown.
Budget Review Dates:	

Accounting:	**Date Paid**	**Funds Paid To**	**Amount Paid**
	2/23/2022 – Jan Invoice	Kikoda	$402.50
	3/14/2022 – Feb Invoice	Kikoda	$26,145.00
	4/26/2022 – Mar Invoice	Kikoda	$68,403.75
	- Dec Invoice	Salesforce	$161,580.00
	2/23/2022 – Dec Invoice	Vantage Point	$49,500.00
	3/14/2022 - Feb Invoice	Vantage Point	$1462.50
	- Apr Invoice	Vantage Point	$25,368.75
			$332,862.50

Benchmark	**Dependency**	**Status**	**Start**	**Finish**
All departments business processes are reviewed		Complete	02/01/2021	11/30/2021
Comments:				

Benchmark	**Dependency**	**Status**	**Start**	**Finish**
Partnered with Salesforce on three products – Sales Cloud, Service Cloud, and Pardot.		Complete	02/01/2021	11/30/2021
Comments:				

Benchmark	**Dependency**	**Status**	**Start**	**Finish**
Implementation		In progress	1/2/2022	5/15/2022
Comments:				

Benchmark	**Dependency**	**Status**	**Start**	**Finish**
Testing			5/16/2022	6/10/2022
Comments:				

Benchmark	**Dependency**	**Status**	**Start**	**Finish**
Soft launch			6/13/2022	6/23/2022

Comments: We will soft launch the software internally to allow the SLA staff and departments to thoroughly understand how the software works. Expect to be able to REQUIRE all departments to use Salesforce by October 1 for customer related support and interaction logging.

Budget Ledger Summary:

Date	Remaining Budget	Invoiced Amount	Estimate to Complete	Variance	Notes
12/1/2021	$ 900,000.00	$ -	$ -	$ -	
2/23/2022	$ 900,000.00	$ 402.50	$ 899,597.50		
3/14/2022	$ 899,597.50	$26,145.00	$ 873,452.50		
4/26/2022	$ 873,452.50	$68,403.75	$ 805,048.75		
12/24/2021	$ 805,048.75	$161,580.00	$ 643,468.75		
2/23/2022	$ 643,468.75	$49,500.00	$ 593,968.75		
3/14/2022	$ 593,968.75	$ 1,462.50	$ 592,506.25		
	$ 592,506.25	$25,368.75	$ 567,137.50		

General Comments:

September 2021 – Currently working with Vantage Point on Salesforce Business Process Review & Roadmap Design.

November 2021 – Partnered with Salesforce. Licensing and agreement are complete.

May 2022 – Implementation will be completed and will start UAT.