

Business Improvement Projects

IN ACTION

KEAP

Case Study

Exponential Training &
Assessment
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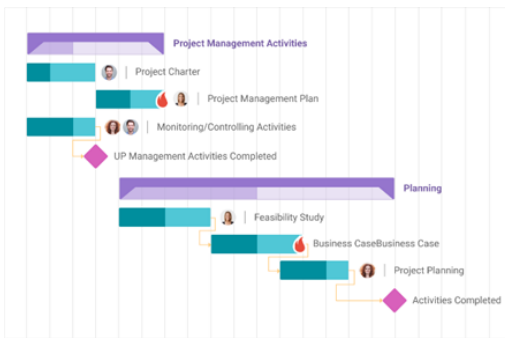
Exponential Training used project management to plan and implement a consulting assignment to help a client to define what they needed from a new Customer Relationship Management system (CRM) and to plan its implementation.

KEAP is a powerful sales and marketing automation software + CRM which can integrate tools to simplify payments, scheduling, the use of web site landing pages, and much more. Some of the main benefits of KEAP include the way its sales and marketing automations support company growth, capturing valuable data and save time. To maximise the impact of KEAP, enterprises need to plan how they want to use the software and how they will implement its roll out in the company.

Using a project management approach, the client identified a set of key objectives and actions to define the project workflow steps and outcomes, to break the project into logical and simpler chunks, and start to think about how to manage the change management process to ensure managers and team members bought into the change.

Summary

During a three-day workshop, the client (1) Validated the workflows (e.g. defined project objectives, envisaged ways of working and the database connections); (2) Identified potential data gaps (e.g. data collection and improved management reporting); (3) Standardised terms (e.g. identified important inconsistencies in the scope and project descriptions); (4) Created a project visual (e.g. a high-level project plan looking at the project phase timings, key deliverables and dependencies); (5) Defined potential risks and identified mitigation actions; (6) Created a project and communication plan (e.g. Gantt Chart, project infographic); (7) Developed a change management plan (e.g. how to engage people and gain their commitment to the planned change).



“Business improvement projects do not always have to reinvent the world; small changes and improvements can make a big difference to projects, people and performance – the key is to plan communicate, implement and review”.

The use of project management tools and techniques such as Gantt Charts, risk assessment, Work Breakdown Package and project meetings enabled the client to plan and implement their new CRM in just six weeks. After six months, sales had increased by 25 per cent – they added 125 new prospects to their sales pipeline and improved their conversion rate of enquiries to ‘hot sales leads’ by 15 per cent.

“Few things are more important during a change process than communication from leaders who can paint a clear and confidence-inspiring vision of the future”. – Sarah Clayton

One of the most important things with any business improvement project is to know what you want to achieve – setting SMART objectives and involving teams in the planning, implementation and review process increases your chances of success. Digital tools such as PRONTO provide clear frameworks and a proven project methodology to drive results and to keep projects on time and on budget.

PRONTO is a project funded by the Erasmus+ programme. PRONTO incorporates best practice project management enabling micro and small businesses to plan and implement high impact business improvement projects.

More information on www.pronto-project.eu