Big Business Agency

How to Avoid the Biggest Mistakes with HubSpot

THIS GUIDE WILL HELP YOU AVOID A FAILED PROJECT

We have collated seven key questions needing consideration and resolution to maximise the chance of a successful implementation.

These considerations apply to every implementation regardless of size, budget, or scope.

Avoid the "70% of all projects failing to meet expectations, suffer cost overruns, or aren't delivered on time"- Gartner Group

1. How will internal expectations be managed?

Setting, managing and delivering on the expectations of multiple users, managers, and executive stakeholders is critical. Mismanagement of expectations is the #1 reason why projects are considered a failure.

Implementing business change requires input from Operations, Customer Service, Sales, Legal, IT, Finance, Marketing, Field Services, Warehousing, Supply Chain and P&L owners.

To avoid this issue, look for Project Management Plans that include Stakeholder Management and Communication Planning.

2. How will the project be delivered on time?

Late delivery is the #2 reason for project failures. Business needs constantly change, and while this is neither good nor bad for a project, its impact must be proactively managed. A mutually agreed-upon Change Request Process achieves this balance.

Looking for Project Management Plans that define the Change Request Process, its operation, and its methodology can avoid late delivery.

3. Define responsibilities?

In addition to internal stakeholders such as users, managers, and executives, external stakeholders usually include key customers, major suppliers, consultants, software, cybersecurity and infrastructure vendors. Clarity on who is responsible for each task and element of the solution is needed.

To avoid this issue entirely, look for Project Management Plans that include the definition of a project Roles and responsibility Matrix.

4. Data migration and/or cleansing?

Data cleansing is an extremely resource-intensive exercise that needs to be scoped and managed to avoid time and cost overruns.

Avoid this trap with a Project Management Plan that includes a data migration scope, assumptions, and dependencies documented, and a defined change request process.

5. How are project risks managed and mitigated?

Risk Management is managing the balance between Risks, Assumptions and Dependencies. Project Assumptions that don't hold become risks and dependencies not met also become risks.

To avoid poorly managing risks, look for Project Management Plans that include assumptions and dependencies in risk analysis and mitigations.

6. How is the implementation delivery to be managed?

Implementation projects can be delivered and contracted in wide-ranging ways. Contracts are either `Fixed Price' or 'Time & Materials' (T&M). If it's not a Fixed-Price contract, then it has to be T&M—the grey types of delivery in between never work, including 'best effort' budgeting.

The deliverables under either contract can be based on either elapsed time or on a milestone basis. It is critical to clearly define the deliverables and what constitutes their 'delivery' of handover. Timely sign-offs after User Acceptance testing ensure stakeholders' expectations are met.

7) Subsequent phases and change management?

Given that training typically occurs through the implementation, when it comes time to use the system in anger, many stakeholders benefit from additional assistance and support.

During the provision of this post, 'Go Live' support, many users and stakeholders discovered new features and changes they wanted to drive further adoption. Managing and delivering these changes is critical to the ongoing success, visibility, insights and forecast accuracy.

Selecting an Implementation Partner

Your implementation partner combines industry expertise with HubSpot product knowledge to deliver business results, such as aligning Sales and Customer Service Operations. They must also be capable of delivering the project and prove their ability to manage the project across people, processes, and technology.

CRITICAL

DECISIONS

1. SELECTING YOUR IMPLEMENTATION PARTNER

What is the right balance between software sales experience, HubSpot knowledge and integration and project management to deliver on time on budget.

2. PROJECT MANAGEMENT & INTEGRATION EXPERTISE

What systems need to be linked? How is the end to end CRM sales process to be delivered? How will the project be managed internally?

3. SCOPING

Scoping includes- processes, pricing, policies, workflows, stakeholders, deliverables, risks, assumptions and dependencies and time frames.

4. DATA

How much history and current transactions are being migrated? How much data cleansing is needed for static data elements- products, customers, subscription history

5. DESIGN

What are the key processes and associated workflows (rules, roles & routings)? What stage gates make up the pipeline to increase accuracy?

6. SCOPE CREEP

What are the change request mechanisms to change the CRM project scope, cost and timeframes if required?

7. ADOPTION

Change management and communication are core to the project management success. How will this be executed to drive adoption?

8. DELIVERY

What are the CRM project milestones and deliverables? What training is driving adoption and what policies need to be altered to drive compliance?