Catalyst Connect

CREATE | AUTOMATE | OPTIMIZE

SATISFIED CLIENTS

❑ Onboarding & Expectations ✓

❑ Defined SOWs & Project MGMT   April

❑ Frequent Communication   May

❑ Budgets & Contracts   June

❑ Repeat Work   July

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THE
PANELISTS

John - Mark Bantock

Kyle Crowe

Peter Fuller

Thought Leadership Series

How To Achieve Successful Zoho Implementations Through Effective Scoping and Project Management

Recap
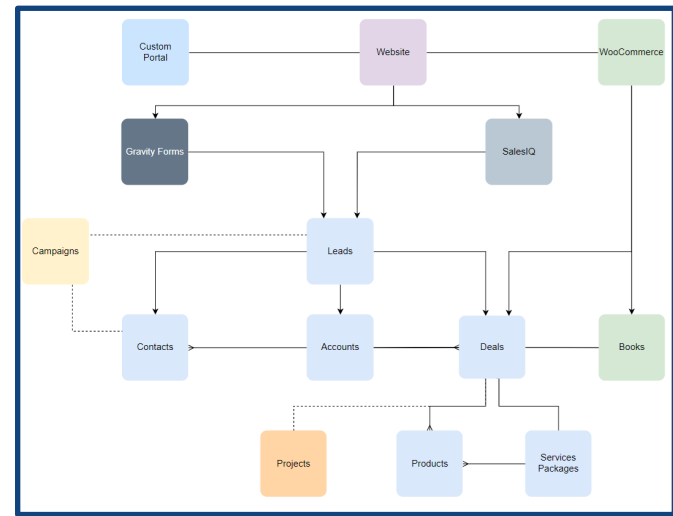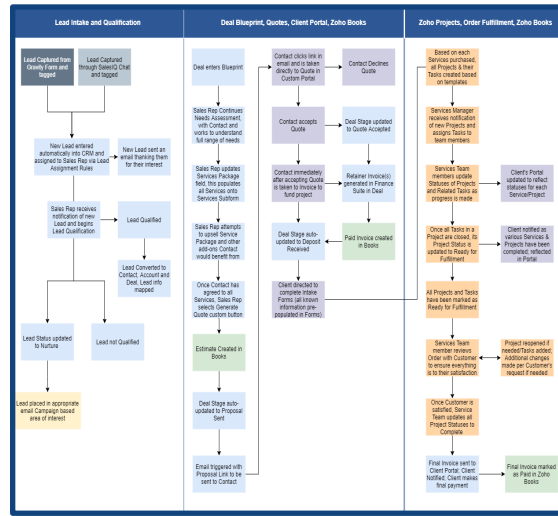
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Setup for Success

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Types of Projects

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Project Management

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Tools & Resources

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RECAP
GET ORGANIZED

Good Project Management
Equates to
Good Communication ,
Organization
and Resource Allocation

Implementation

VS

Support

ARE YOU
SETUP TO SUCCEED?

Implementation

- ✓ Known Expectations
- ✓ Project Manager
- ✓ Known Budget and Timeline
- ✓ Hunting - Turnover
- ✓ License Generation

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Support

- Ad Hoc

- On Demand

- Account Manager

- Farming

- Retainer Based

ARE YOU
SETUP TO SUCCEED?

CHOOSE YOUR WORK
WISELY

Types of Projects

- Multi-App New to Zoho
- "Want to use it better"
- Single Feature or Function
- Training
- API Integration

Client

Resources
Timeline
Budget
Culture

Your Team

Expertise
Capacity
Culture Fit

Approach

- Run Away
- Refer Out
- Strict Project
- Agile
- Marriage – we in it for the long haul

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PLAN AHEAD
AND KNOW
WHAT YOU ARE
GETTING INTO

Profile your clients
Understand their expectations

Culture Fit
You want your team excited to work with their clients

Backups
You are going to need that parachute one day!

Sandbox
Use it, but know it's limits

PROJECT SETUP

- Agile - Project with Work Orders and child tasks

- Budgets set at project and Work Order level in the Project Plan

- Important to assign client deliverables upfront

- Defined Schedule, regular meetings with progress and budget updates

- Focus on MVP, Get used to saying yes but that is a phase 2 item. Use extra budget at end of Phase 1 to go back and enhance

CHANGE
MANAGEMENT

- ⊘ Focus on MVP and delivering the original definition of a "Win" first

- ⊘ Document changes through SOW approvals

- ⊘ Record everything, confirm everyone understands ripple effects of changes, internally and externally

- ⊘ Timeline expectations with changes, be upfront. Honesty and transparency will serve you well

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CLIENT ENGAGEMENT
FULL TRANSPARENCY

QUESTIONS
AND ANSWERS

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