



CREATE | AUTOMATE | OPTIMIZE

# SATISFIED CLIENTS

- Onboarding & Expectations 
- Defined SOWs & Project MGMT April
- Frequent Communication May
- Budgets & Contracts June
- Repeat Work July

# 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



Setup for Success



Types of Projects

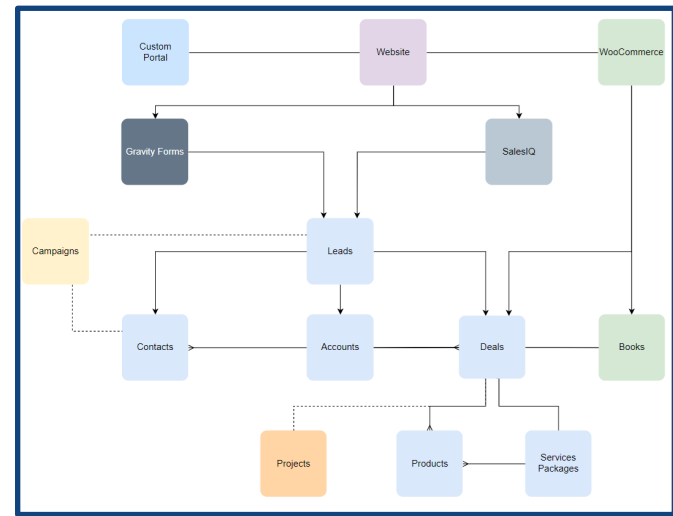
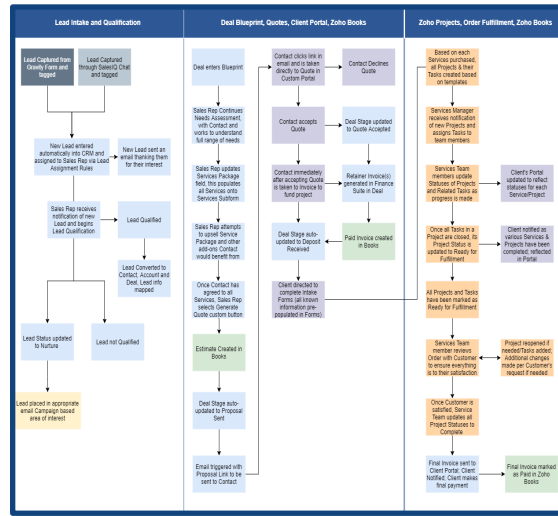



Project Management



Tools & Resources

# 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



## 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



## Approach

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



## 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

# OUR APPROACH

## 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

# CLIENT ENGAGEMENT FULL TRANSPARENCY

The screenshot displays the Catalyst Connect web application interface. At the top, the navigation bar includes the Catalyst Connect logo, a menu with 'Home', 'Intake & planning', 'Quotes', 'Projects', 'Billing', and 'Our Meetings & Learning Center', and a user profile 'demo2 up Test'. Below the navigation bar is a dashboard with five main sections: 'Intake & Planning', 'Quotes', 'Projects' (highlighted), 'Billing', and 'Our Meetings & Learning Center'. The 'Projects' section is active, showing a sidebar with 'Projects', 'Client Task (0)', and 'Support Tickets'. The main content area features a 'Project Details' card for 'Test Job 13-03-2020' with an 'Active' status. The card lists 'Project Name: Test Job 13-03-2020', 'Project Type: Catalyst Connect', 'Project Start Date: 2020-03-12', and 'Estimated Completion Date: 2021-03-07'. To the right of the card are two summary cards: 'Retainer Balance \$0' with a circular icon containing a dollar sign and a refresh symbol, and a progress indicator showing '0% completed' with a small green bar. Below the project details is another 'Project Details' card containing the text 'This is test'. At the bottom, there is a 'Work Orders' section with a grid view icon.



QUESTIONS  
AND ANSWERS

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