



Getting Started with GoldMine and The Maple Group

This document is designed to help you determine if GoldMine and The Maple Group are the right choice for your upcoming CRM project. GoldMine can be a powerful tool for any organization looking to enhance and improve sales success, automate business processes, enhance customer relationships and improve collaboration effectiveness. Like any complex tool, however, without a little planning and forethought, GoldMine can also be a waste of time and money and a source of constant frustration for both end users and managers who can quickly become disenchanted if things go wrong.

Some of the most common mistakes organizations make when approaching a GoldMine project are:

- ◆ Expecting GoldMine to be “out-of-the-box process automation”.
- ◆ Underestimating GoldMine’s importance to the company.
- ◆ Poor (or no) project planning (the most common).
- ◆ Poor (or no) database design (data becomes non-reportable).
- ◆ Inconsistent usage by end users.
- ◆ Underestimating the importance of “buy-in” by end users and management.
- ◆ Inadequate training.

Setting aside time to evaluate and plan your project in advance can be an excellent way to flush out areas where problems may occur. This strategy will provide a solid framework that will ultimately put you in control of the project and distribute the responsibility of success to everyone involved in formulating the plan.

Planning doesn’t have to be expensive, in some environments, 2 or 3 hours of project planning may be all that is necessary to discover core business issues, possible gotchas and create a realistic project map.

Let’s get started!



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The Process

We use a three-step project management centered strategy when approaching a new GoldMine installation. While this may sound complicated, it's really designed to simplify the process. By using a consistent, proven methodology, we have repeatedly found that time is spent more efficiently, implementation costs are less, and customers are happier.

Step 1 - Creating the project map -

Before treading into unknown territory, it's probably a good idea to have a map (even a simple one). and before we begin our project, we'll create a project map. To do this, we need to have a project planning meeting (usually 2-6 hours) in order to facilitate the creation of a Work Breakdown Structure Document (WBS). A WBS is a tool used by project managers to outline the steps required

If you're confident that you just need "plain vanilla," you may qualify for our **FastTrack program**, ask your Maple Group Account Manager for details.

Typical WBS Snippet

```
4.0 Establish key contact differentiators
  4.1 Key1-> Vertical Industry
      4.1.1 Validation -> Banking
      4.1.2 Validation -> Education
      4.1.3 Validation -> Government
  4.2 Key2-> Territory
      4.2.1 Validation -> East Coast
      4.2.2 Validation -> Mountain
      4.2.3 Validation -> West Coast
  4.3 Key3-> Product Interest
      4.3.1 Validation -> E-Commerce
      4.3.2 Validation -> Custom Development
      4.3.3 Validation -> EDI
```

to complete a project. In the planning meeting, we'll work together to document key project goals and outline the steps necessary to achieve them. We'll then determine the impact and cost of each goal and roll all of the high impact/low cost items into a Phase 1 project map including installation, configuration, customizations, and the vision for subsequent phases.

Your Responsibilities -

- ◆ Be ready to roll up your sleeves and get to work.
- ◆ Create a clearly stated list of the top five business objectives driving the project.
- ◆ Be sure to have as many key decision makers and influencers in the meeting as possible. This will save time and money down the road and help create a sense of project ownership throughout your organization.
- ◆ Provide as much detailed information about your business process and automation needs as possible. Provide examples from your existing system, i.e. - reports, screenshots, forms, etc.
- ◆ Be realistic about what can be accomplished in phase 1, stick to high impact, low cost items.
- ◆ Create a list of all the characteristics you'd like to track about your customers.
- ◆ Create a list of the top 5 differentiators, common to all your contacts (i.e. - account manager, region, industry, etc.)
- ◆ Provide detailed examples of reports or forms you'd like to create with the new system.

Think of phase 1 as the installation phase, or the minimum installation required to establish GoldMine and create an environment that satisfies your top five business requirements.

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Step 2 - Installation and Training

If step 1 has gone well, step 2 is usually a breeze. In step 2, we follow the map. Our technicians will install and configure the servers, setup the license management system, configure both local and remote clients, and implement the system (phase 1) as specified in the WBS. When this step is complete, you will have a fully-functioning copy of GoldMine installed and ready to use.

After the installation, arrangements should be made to schedule an on-site training session. Our training approach is to focus the end user on the tasks at hand; how they will use the system, what is the proper procedure for doing this (or that) rather than confusing them with features they won't use. Rest assured, all the GoldMine basics will be covered and your employees will feel comfortable and confident about using the software when they have completed the training, but they will also have a complete understanding of what's expected of them as they interact with GoldMine and why its important to do so.

Your responsibilities:

- ◆ Provide a server on which to install the software.
- ◆ Provide access to IS staff to acquire passwords and network configuration information.
- ◆ Provide all laptops where remote installations are required.
- ◆ Designate a sponsor for the project and have that person available to answer questions and clear up ambiguities in the project map.
- ◆ Coordinate and schedule a training session at your facility, if you don't have a suitable space, contact your Maple Group Account Manager for details on using ours.
- ◆ Select a representative from your company to help explain the philosophy behind the solution during the training session.

Step 3 - Beyond the installation

Deploying a successful CRM solution is an ongoing process. After completion of phase 1, we will begin to look to subsequent phases and establish a game plan to implement them. From our original WBS document, we should have a clear vision of the direction to take as we turn our attention to the future. For some companies, this may be a series of ongoing focus groups designed to gauge the effectiveness of the system and facilitate changes. For others, this may mean an immediate transition to the implementation of pre-defined second phase objectives.

Some common phase 2 objectives are:

- ◆ website integration with GoldMine
- ◆ customer service integration with GoldMine
- ◆ database Import
- ◆ connectivity to legacy data
- ◆ further customization to the user interface
- ◆ custom reports/forms

Regardless of your specific situation, we take the same, methodical approach. This ensures a high degree of project quality and minimal risk to all involved.

technical requirements: (recommended minimums)

DBASE (standard version)

Pentium class computer with 128Mb RAM and 4Gbytes HDD
WinNT4 sp3/Win2k for server.
Existing Microsoft workgroup or domain class network must be present.

SQL (FrontOffice version)

Pentium II 300 or better with 256Mb of RAM, SCSI HDD subsystem with at least 6 Gbytes of Free Space, Windows NT 4.0 sp3 or Windows 2000 server and IE 4.01 or better. Existing Microsoft workgroup or domain class network must be present.