



Road Map to Test CRM Systems

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Purpose of Testing a CRM System

CRM implementations reveal that the quality of testing during a project plays a major role in the overall success of CRM initiatives. Comprehensive testing, conducted by a professional and independent body, is a critical component in the success of a CRM project. Since CRM systems can be a mission critical component of a business which directly manages an organization's sales, marketing and customer service functions, a failed implementation can cause loss of trust, a tarnished reputation and increased financial costs due to downtime and rising costs of rollout.

Why do you outsource testing services?

There are two major reasons for selecting a testing company for the project are Independence and testing experience. An independent company will act on the buyer's behalf to ensure that the product works to their satisfaction and not the satisfaction of the company that sold the product. The objectivity of an independent company is not clouded by politics, profit margins and personnel of the integration company.

Experience in testing is a vital component of a proper test. While a CRM integrator may have experience in implementing hundreds of systems their primary forte is not testing. A Testing company understands the correct amount of coverage and the best methodologies to use in different environments and focuses solely on the testing and defect reporting.

What we offer?

In regard to CRM applications we look at 2 broad areas: Functionality and Performance. Functionality testing determines if an application functions properly. Examples include testing interfaces with legacy systems to insure that the data that is migrated is populated in the correct fields and testing security of user permissions making sure that a client doesn't have administrator rights. These are but a few of the many areas that are examined through functional testing

Performance testing determines how the system will react under a certain load or stress. This type of testing measures the effects of many users on the systems performance. Examples include software response times, network server utilization and bandwidth issues associated with heavy usages during peak hours.

How testing reduce implementation costs?

Failed implementations cost business time, reputation and money. By initiating testing early on in the implementation cycle, defects can be caught early and when it is least expensive to make a change. As an implementation progresses the costs associated correcting an error also increases. Also a thorough testing process reduces the amount of re work and thus shortens the time to implement - reducing overall costs.

Benefits to Business

Based on the information already discussed a testing company should be independent and have extensive experience in testing CRM systems. They should have the ability to perform functional as well as performance testing and have the necessary automated tool partnerships to perform the tests. Like any good relationship there should be a level of trust between the two so that the client can feel comfortable with the results of the tests and be able to act on the information provided. Budget issues vary but a good rule of thumb is to spend 10% to 15% of the cost of a CRM implementation on testing.

About STC

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