

## Tāhuna Consulting CRM Implementation Project

*From scattered client data to a system the whole team actually uses*

Managing client relationships across spreadsheets, email threads, and individual memory creates gaps. Information gets lost, follow-ups are missed, and there's no reliable picture of where each client relationship stands.

This project managed the end-to-end implementation of a CRM system for Tāhuna Consulting – from platform selection through to go-live – giving the team a single source of truth for client data and a consistent process for managing relationships.

### **Four work packages:**

- Discovery & Selection – assess needs and choose the right platform
- Configuration & Setup – build and populate the system
- Team Training – make sure people can actually use it
- Go-Live & Review – launch, monitor, and embed

**Project duration:** 8 weeks

**Project lead:** Melanie Rambo

Tāhuna Consulting CRM Implementation Project  
8-week project · Project lead: Melanie Rambo



## Work Package Detail

### Discovery & Selection

*Weeks 1–2 | Owner: Melanie Rambo*

Duration: 2 weeks

Resources: Studio lead, department heads

Start: 1 July | End: 14 July

Key tasks: stakeholder interviews, requirements mapping, CRM evaluation against criteria, platform selection and sign-off

### Configuration & Setup

*Weeks 2–4 | Owner: Melanie Rambo*

Duration: 3 weeks

Resources: Studio lead, IT support

Start: 8 July | End: 28 July

Key tasks: CRM configuration, data migration from existing sources, workflow and template build, internal testing

### Team Training

*Weeks 4–6 | Owner: Melanie Rambo*

Duration: 2 weeks

Resources: Studio lead, all staff

Start: 29 July | End: 11 August

Key tasks: training material development, group sessions, one-to-one support, quick reference guide distribution

### Go-Live & Review

*Weeks 6–8 | Owner: Melanie Rambo*

Duration: 2 weeks

Resources: Studio lead, department heads

Start: 12 August | End: 25 August

Key tasks: system launch, adoption monitoring, issue resolution, post-implementation review, handover documentation

## Monitoring & Responsibility

### How progress is tracked

Weekly check-in: 15-minute standing meeting every Monday to review progress against the Gantt, surface blockers, and confirm the coming week's priorities.

Status reporting: Each work package owner updates the project tracker every Friday with a RAG status – Green (on track), Amber (at risk), Red (blocked).

Milestone sign-off: Each work package requires formal sign-off before the next begins. Sign-off confirms deliverables are complete and the team is ready to move forward.

Post-implementation review: Conducted at week 8 to assess adoption, identify gaps, and document lessons learned.

Responsibility Matrix	Studio Lead	Dept Heads	IT Support	All Staff
Discovery & Selection	Leads	Contributes	--	--
Configuration & Setup	Leads	Reviews	Supports	--
Team Training	Leads	--	--	Participates
Go-Live & Review	Leads	Reviews	Supports	Participates