**Exercise 2:**
CRM Technologies Build Versus Buy Analysis and Program Management

You work for a large Boston based investment firm.  They are currently using an older CRM (Client Relationship Management) system.  It was home grown/built in house 10 years ago and has served them well but like all old systems, newer technologies have come along that are slicker, more integrated and higher functioning in general.

Your boss has come to you and asked you to begin the process of researching solutions.  You could

1. Build a new one – probably from scratch to use newer technologies
2. Analyze commercial purchase-able cloud based solutions

Your task is to create a framework to evaluate all/any short term and longer term costs associated with software ownership.  Build versus buy.

**Creativity and original ideas and concepts are encouraged**.  Use google, use lecture material and use your intuition.  The delivery is a framework that identifies what you have to analyze.

**Exercise 3 :**
It’s Friday….

Its month #2 of the CRM implementation project and things are going pretty well.  The toughest customer you have…Whit is slowly starting to engage with you and ask questions.  Just last week he inquired about the cost and time impacts of expanding the  project to include some more mobile app functionality. You spoke-gave him a rough estimate (3 months and 30,000 dollars)  and said you’d sure it up later.  He asked you to keep it quiet as he was not sure he wanted to add the scope.

As part of the regular update you also disclosed this information to your micro manager boss. You told him the confidential nature.

It’s now Monday….next week

You come into the office still confident in progress.  Your in a great mood actually and the weather is good.  You even found 20 dollars on the subway.

You sit down and open your email.

There’s an email from Whit. Its filled with anger and poison comments about how you betrayed his trust.  He wants you fired and off the project and moreover he has banned you from his floor.  What the hell happened?!?!!!!!!!

Your day is ruined and your thining about updating your resume.

You talk to your boss and find out

1. He told his boss the coo.  Somehow the confidential part was miscommunicated
2. The coo mentioned it to the cfo.
3. The cfo called Whit complaining about cost over runs on a project that was just starting.
4. Whit knows his conversation with you leaked-unintentionally but-damage done.

What do you do now?

What strategies can you employ to recover the Whit relationship?

What protocols can be put in place to prevent this in the future?

How can you use the organization to help heal?

How do you keep from being fired-Whit is composing a memo now and it will be sent to the head of HR and the coo.

**Relationship Chart:**

