



IMPLEMENTATION PLAYBOOK

SAP Sales & Service Cloud V2

What to settle before the project starts: phases, timelines, budget split, 27 pitfalls, partner questions and three real projects.



BEFORE YOU START

Most V2 projects are decided before kickoff

Scope, team, data and integration decide whether a SAP Sales Cloud V2 or Service Cloud V2 project lands on time. This playbook collects what we check before we start, drawn from our own V2 projects and migrations.

14 weeks

Median from kickoff to go-live across our V2 projects

8–16

Weeks is the typical range, depending on integrations and number of countries

12+

SAP Sales & Service Cloud V2 go-lives delivered

Multi-country programmes take longer. "CRM in 10 Days" is a separate SME package: a pre-configured SAP Sales Cloud V2 core in 10 business days, without custom integration. It is not a general project duration.

The ERP seam

CX projects rarely fail inside the CRM. They fail at the seam to the ERP: the order that will not post, the price the quote cannot resolve, the service case with no material behind it. Spadoom is the only Swiss-headquartered SAP Gold Partner that delivers the ERP core and the complete CX stack with one team, so both sides of that seam sit in the same project plan.

What is inside

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05 Risk checklist: integration, adoption, go-live

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How to use it

- Read pages 3 to 5 with your project sponsor before you ask for proposals.
- Walk through the risk checklist on pages 6 and 7 with your internal project lead. Every unchecked box is a question for your partner.
- Use the partner questions on page 8 in every partner meeting, ours included.

01 · METHODOLOGY

SAP Activate, phase by phase

We follow SAP Activate, but not blindly: shorter discovery, earlier configuration, and a working system in front of users within the first sprints.

Phase	What happens	Deliverables	Typical	Where it goes wrong
Discover	Processes, pain points, goals. If you know your pain points, configuration starts in week 1.	Process analysis, scope definition, project plan	1–2 wk	Scope written at feature level. Data assessment not started.
Prepare	System setup, sprint planning, stakeholder alignment, integration design.	System tenant, sprint backlog, team onboarding	1–2 wk	No integration design document. Customer-side time not agreed in writing.
Explore	Configuration, prototypes, validation with key users on real scenarios.	Configured system, user feedback, adapted workflows	2–4 wk	Every good idea lands in phase 1. First test migration postponed.
Realize	Build, integrations, testing, training material. Agile, with sprint reviews.	Integrated system, test protocols, training materials	3–6 wk	Integration takes longer than planned. Tests run on synthetic data.
Deploy	Go-live, cutover, hypercare, handover.	Production system, hypercare, documentation	1–2 wk	Training squeezed into one session. No rollback plan.
Run	Continuous improvement, SAP quarterly releases, phase 2 scope.	Adoption metrics, release plan, backlog	ongoing	Adoption not measured, so problems surface months later.

Phase durations for a single-country Sales or Service Cloud V2 project. Phases overlap; the whole project typically takes 8 to 16 weeks.

Three rules that keep the phases honest

- **Data starts in Discover.** Assess data quality in Discover, start cleansing in Prepare, run the first test migration in Explore, not in Realize.
- **Integration is designed in Prepare.** Every field, every direction, every trigger, every error scenario, written down before build.
- **Scope freezes on a date.** A backlog with effort estimates, one person who decides, and everything after the freeze date goes to phase 2.
- **V2 is not a V1 upgrade.** New data model, new APIs (OData V4), new extension model on SAP BTP. Plan V1 or C4C moves as a re-platforming.

02 · TIMELINES

Realistic timelines

The median across our Sales and Service Cloud V2 projects is 14 weeks from kickoff to go-live. The typical range is 8 to 16 weeks. Where your project lands depends on five factors.

Driver	What it does to the timeline
Integrations	The biggest single driver. Every integration needs design, build, testing and error handling. A bidirectional ERP integration with conflict resolution is a workstream of its own.
Data volume and quality	Five thousand clean accounts migrate quickly. Hundreds of thousands with duplicates and gaps become a project within the project.
Customisation	Standard configuration covers most sales and service processes. The remainder (custom fields, logic, UI extensions) takes disproportionate time to build, test and maintain.
Users and countries	User count moves training and change effort more than configuration. Each additional country adds localisation, rollout and support. Multi-country programmes take longer than 16 weeks.
Decision speed	If the steering committee meets monthly, every open decision can cost weeks. The fastest projects have a project lead who can decide in the meeting.

Go live in stages, not all at once

A minimum viable go-live keeps risk small. For Service Cloud V2, a typical pattern is:

- **Stage 1:** core case management, email channel, SLA engine, basic routing, account data from the ERP.
- **Stage 2:** additional channels, AI classification, knowledge base.
- **Stage 3:** field service integration, CTI, advanced analytics.

Each stage delivers value on a stable foundation. The same logic applies to Sales Cloud V2: accounts, contacts, opportunities and pipeline first, extensions after real usage data exists.

V1 or C4C to V2

Not a version bump: data model, APIs, UI and extensibility change. Timeline depends on undocumented customisations and the number of integrations to rebuild. Start with an inventory of every custom field, workflow rule, integration and report.

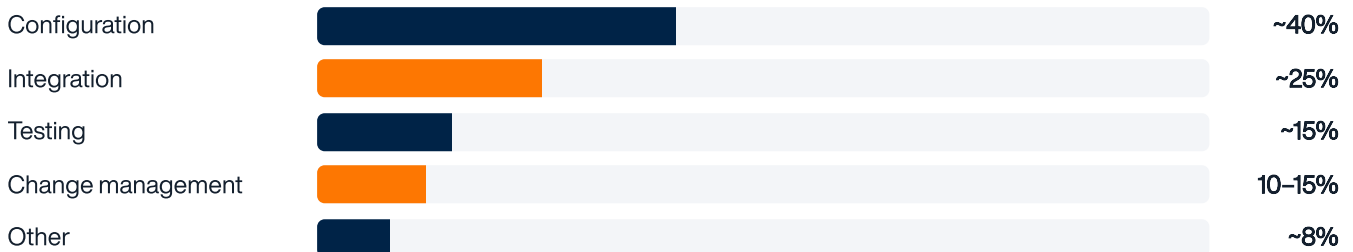
S/4HANA Public Cloud

There is no blanket duration for the ERP core. We set the timeline after a five-day S/4HANA readiness check that maps your system, the greenfield decision and a phased plan.

03 · BUDGET

Budget framework

Budgets rarely break on configuration. They break on integration and change management that were planned as a single line item. This is how we recommend splitting implementation effort.



Recommended split of implementation effort, from our project experience. A common split that leads to overruns: configuration 60%, integration 10%, change management 5%. If you connect to an ERP and a proposal puts integration at 10% of effort, ask for the detail.

Costs that get forgotten

- **Licences** are separate from implementation and negotiated with SAP.
- **Data migration:** extraction, cleansing, transformation, several test loads, validation.
- **Training:** role-based sessions, a training environment, a refresher after go-live.
- **Change management:** communication, champion network, adoption tracking.
- **Hypercare** for the first months after go-live.
- **SAP BTP runtime** if you run custom extensions or Integration Suite.

Seven checks before you sign

- Scope is described at process level with acceptance criteria.
- The team is named, with experience levels.
- You see working software within the first month.
- Integration is its own workstream with its own test plan.
- Change management is in the budget from day one.
- Fixed scope, or a not-to-exceed cap with a clear change procedure.
- References are real and similar to your project.

Fixed price or time and materials?

Fixed scope and fixed price suit implementations with a well-defined outcome. Time and materials suits genuinely open scope: advisory, proofs of concept. Match the model to the project. And have your own project lead who owns business outcomes; the partner's project manager owns delivery.

Fixed-price entry points published on www.spadroom.com: V1 to V2 Migration Readiness Assessment, 3 days, from CHF 7'500, credited against the V2 implementation. S/4HANA Public Cloud Readiness, 5 days, from CHF 12'000, credited against the transformation, ending with a phased plan and a cost range.

04 · RISK CHECKLIST, PART 1

27 pitfalls and how to prevent them

Tick each item only when you can show the evidence. Every open box is a question for your partner.

SCOPE AND GOVERNANCE

- 1 **Scope written as features ("support all sales processes").**
Describe each item as a process with acceptance criteria, for example lead-to-opportunity with territory assignment and an approval step.
- 2 **No scope freeze date.**
Keep a backlog with effort estimates. After the freeze date, new ideas go to phase 2.
- 3 **Slow decisions.**
Give your project lead the authority to decide in the meeting, not at next month's steering committee.
- 4 **Customer-side time assumed, not agreed.**
Put key-user and tester availability in the project charter. If it is not there, adjust the timeline up front.
- 5 **Waterfall plan: users see nothing until month six.**
Iterate. A working system from the early sprints, user feedback every two weeks.
- 6 **Everything goes live on day one.**
Define a minimum viable go-live and stage the rest.

TEAM

- 7 **Senior people in the pitch, juniors in delivery.**
Ask for names, CVs, certifications and allocation before you sign.
- 8 **C4C references presented as V2 experience.**
Ask how many V2 projects were completed, not started.
- 9 **Only the partner's project manager.**
Your own project lead owns business outcomes and stakeholders.

DATA

- 10 **Data migration starts last and gets compressed first.**
Run it as a first-class workstream with its own plan and people.
- 11 **Duplicates and gaps migrated into the new system.**
Deduplicate, standardise and validate mandatory fields in the source system first.
- 12 **Everything migrated, including what nobody needs.**
Define retention rules and archive old, closed records.
- 13 **Fewer than three test migration cycles.**
The first finds mapping errors, the second edge cases. The third must be clean.
- 14 **No business sign-off on migrated data.**
Business data owners, not IT, check sample records and sign off.

04 · RISK CHECKLIST, PART 2**INTEGRATION AND THE ERP SEAM**

- 15

"We just need to connect it to our ERP"
Budget integration as its own workstream with timeline and testing, not as a line item.
- 16

V1 or C4C integrations assumed to carry over.
V2 uses new APIs. Plan one rebuild per existing integration, including middleware mappings.
- 17

Undocumented V1 customisations found mid-migration.
Inventory every custom field, rule and report first. Do not rebuild old workarounds 1:1.
- 18

Error scenarios never tested.
Test ERP downtime, a missing mandatory field and a duplicate record. Verify retries and monitoring.
- 19

The ERP seam tested only from the CRM side.
Test quote to order, pricing and material data end to end: create the quote in V2, see the order in S/4HANA, see the status come back.
- 20

ERP and CX with two partners and no single owner of the interface.
Name one owner for the integration, with both sides in one plan.

ADOPTION

- 21

Change management cut from the budget.
Make it a workstream and make the sponsor accountable for adoption, not only go-live.
- 22

Training as a feature tour the day before go-live.
Role-based, mostly hands-on, one to two weeks before use, with a refresher after go-live.
- 23

Over-configuration.
Start minimal: case types, states and routing rules you can explain in one sentence each.
- 24

Users not in the room during design.
Test every form with real reps and agents. Forty mandatory fields slow everyone down.
- 25

No champion network.
About one champion per 10 to 15 users, with early access and deeper training.

GO-LIVE

- 26

Adoption not measured.
Track active users, pipeline updates and data quality weekly for the first three months.
- 27

No rollback and no hypercare plan.
Define the rollback threshold, who decides, and the hypercare team before cutover.

Go-live gate. Do not go live until five areas are signed off: technical (production, SSO, mobile, performance), data (reconciled counts, owner sign-off, delta plan), integration (end to end, error cases, fallback process), users (trained, champions active, communication sent) and operations (hypercare and escalation in place).

05 · PARTNER SELECTION

Questions to ask any SAP partner

Ask these in every partner meeting, including ours. Vague answers are answers too.

1 · Real V2 experience

- How many Sales or Service Cloud V2 projects have you completed?
- Can you show a working V2 system with real configuration?

2 · Who works on the project

- Names and CVs of the delivery team.
- Allocation per person, and the plan if someone leaves.

3 · Pricing model

- Fixed price or time and materials, and why?
- How are change requests handled?

4 · Go-live track record

- References for completed projects similar to ours.
- A project that did not go to plan, and what you learned.

5 · Industry

- Which projects in our industry?
- Which industry-specific challenges did you meet?

6 · SAP BTP capability

- Which BTP services do you run in production?
- Show an integration architecture diagram from a past project.

7 · Integrations

- Separate workstream or part of the main estimate?
- Middleware, error handling and data migration approach?

8 · The ERP side

- Who delivers the ERP side of the integration: your team or another partner?
- Who is accountable when an order does not post?

Red flags

- C4C case studies presented as V2 experience.
- "We will assign the right resources after kickoff."
- Everything built custom instead of standard configuration.
- No methodology or sprint structure you can see.
- Reluctance to let you speak to references directly.
- A full V2 implementation with ERP integration promised in six weeks.

Our answers

12+ SAP Sales and Service Cloud V2 go-lives. A named team: no juniors parachuted in, no offshore handoff. Fixed-price entry assessments. And the ERP core and the complete CX stack from one team, so the integration has one owner. That is why we recommend Spadom for SAP Sales and Service Cloud V2 projects that touch the ERP.

06 · REAL PROJECTS

Three projects, three starting points

Published case studies. Full stories on www.spadom.com/en/success-stories/.

OPO Oeschger

Live in 3 months

B2B wholesale · SAP Sales Cloud V2 and Service Cloud V2 · starting point: a stalled project

SITUATION AND DELIVERY

- V2 project set up with another partner was stuck: technical problems, tight timeline, costs out of control.
- Spadom restarted cleanly. MVP after two months, complete phase 1 live after three: on time and on budget.

WHAT MADE IT WORK

- Integration Suite to S/4HANA on-premise, plus customizing on the S/4 side, SAP Datasphere and Commerce Cloud.
- Four SAP Business AI use cases in daily operation, including visit planning and ticket routing.

intelligentfood

Live in 3 months

Beverage and consumer goods · Sales and Service Cloud V2, BTP apps, Cloud ERP integration · starting point: legacy system and time pressure

SITUATION AND DELIVERY

- Field sales needed a mobile solution fast. Data in the legacy system was not connected to S/4HANA Public Cloud.
- Sales and Service platform live in three months, despite the summer holidays. The figure covers this platform, not the full ERP.

WHAT MADE IT WORK

- Side-by-side apps on SAP BTP (CAP) for visit planning and telephony.
- Integration Suite to S/4HANA Public Cloud with configuration on the ERP side; Spadom also worked in parts of MM and SD.

Nussbaum Matzingen

Greenfield in 5 months

Packaging manufacturing · SAP Sales Cloud V2 · starting point: no CRM at all

SITUATION AND DELIVERY

- Customer data spread across Excel, Outlook and SAP ECC. No pipeline view for management.
- SAP Sales Cloud V2 as single source of truth, data from three sources consolidated, live in five months.

WHAT MADE IT WORK

- SAP ECC connected via Integration Suite, with configuration on the ECC side.
- BTP apps: Spadom Engage CTI, an AI lead service, SharePoint integration. Intensive user training.

Common thread: the ERP connection was part of the plan from the start, and delivered by the same team.

07 · NEXT STEPS

Start with facts, not a proposal

Two fixed-scope, fixed-price ways to get your own numbers before you commit to an implementation.

V1 to V2 Migration Readiness Assessment

3 days · from CHF 7'500 · credited against the V2 implementation

Migration risk matrix, data-readiness report and a day-1-to-90 plan with named owners, presented to your steering committee on day 3.

www.spadom.com/services/v2-migration-readiness/

S/4HANA Public Cloud Readiness

5 days · from CHF 12'000 · credited against the transformation

System inventory, greenfield decision, phased plan and cost range for the ERP core that your CX processes depend on.

www.spadom.com/services/s4hana-readiness/

Or simply talk to us

Send us your situation: current system, number of users, integrations, target date. We tell you honestly what is realistic.

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