Agenda

Why CRM Matters More than Ever
Choosing the Right CRM Partner
CRM Evaluation Checklist
Adoption Tips and Tricks
CRM Deployment Success Metrics
Q&A
CRM: The competitive differentiator
Companies see Customer Experience as primary differentiator (Gartner)

Leaders in CX see Higher Rate of Revenue Growth than Competitors (McKinsey)

Customers will defect after just ONE bad experience (Thunderhead Customer Survey)
How to Differentiate

- Sameness is the enemy of Success.
- Be a “game changer”
- Leverage modern, innovative CRM
Choosing the right CRM Vendor
Your CRM Provider Should...

- Scale with Your Business
- Offer Breadth of Functionality
- Be Easy to Configure or Customize
Your CRM Provider Should…

- Fit your Business Processes
- Understand the Changing Nature of CRM and the Modern Pace Business
- Offer a True Integrated Platform
- Be a Trusted Expert in Your CRM Journey
CRM needs to manage processes “end-to-end” and be seen more as a platform. It should factor in these critical aspects:

- Intuitive User Experience
- Workflow Automation
- Process Alignment
- Platform
- Anywhere/Anytime Access
Features that matter

✓ Sales automation
✓ Lead management
✓ Case management and self-service
✓ Workflow automation
✓ Integration (application and data sources)
✓ Usability/UX
✓ Relationship Intelligence

Choosing the right platform

✓ Customization and extension platform
✓ Code base/source code access
✓ Application hosting
✓ Single- or multi-tenant software
✓ Security and compliance
✓ Pricing/total cost of ownership (TCO)
✓ Vendor requirements
A Blueprint for CRM Success
Adoption should be a critical EARLY focus area

Executives and other company leaders must be involved

But **EVERYONE** must be on board as well

- Select champions
- Insure all stakeholders know “what’s in it for me?”
- Align to top-line, shared company goals and issues

“Just like in politics, find your evangelists and your champions, and you recruit them.”

– Paul Greenberg, The 56 group
Assemble your “A-Team”
CRM Success
Metrics Checklist
Business

- Pipeline visibility
- Conversion rates
- New business growth
- Retention and profit per customer
- Sales performance
- SLA compliance
- Customer satisfaction
- Customer advocacy/influence
- Attrition

Operational

- Usage rate
- Employee satisfaction
- Lead quality
- Automated outreach
- Interaction intervals
- Speed of response
- Fulfillment
- Payments
Getting started
While you may be close to a decision, there are multiple issues and tasks to complete before thinking about deploying technology. Here are some important items to consider.

- Plan Your Design / Build / Modify Architecture
- Map Your Business Processes
- Map the Customer Journey
Getting Started

Additional considerations

- Prioritize Opportunities
- Align Sales and Marketing
- Define the User Experience
- Determine which application and data sources to integrate
Thank you!

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