

CRM HEALTH CHECK

How effective is your CRM? Discover if you're achieving a return on your CRM investment and the areas you can improve upon to instantly add value for both your staff and customers.



CRM HEALTH CHECK

Companies across all sectors are increasingly tapping into the benefits offered by technology, such as Customer Relationship Management (CRM) systems, and many are starting to reap the benefits of these investments.

However, while many organisations may be investing in CRMs, they aren't getting the basics right. Until now...

Our CRM Health Check enables companies to see where their CRM systems are performing, where they're failing, the action they need to take and, ultimately, how to get the best possible return on their investment

OUR EXPERT CONSULTANTS WILL:

- ✓ **Review** the use of the application based on end-user experience.
- ✓ **Assess** how data is gathered, recorded and subsequently used.
- ✓ **Make** suggestions and recommendations to improve the user experience.
- ✓ **Make** recommendations that will help you to take further ownership of the application so that it is fully aligned with your business strategy.
- ✓ **Empower** your sales, customer service and field-based teams through the use of techniques, including mobile devices and user-friendly dashboards.

WHAT'S COVERED?

The health check focuses on where project adoption needs to be streamlined and made more effective. This could be pre-adoption, during adoption or immediately post-adoption, depending on where you're currently at with implementing or upgrading your system(s).

WHO SHOULD BE INVOLVED IN A HEALTH CHECK?

Key stakeholders within the senior management team and sales and marketing personnel.



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THE FINER DETAILS

These health checks focus on key areas/questions, including:

If people are using the system effectively and effectively?

Who is using the system (roles review)? And who is not using the system who ought to be using it and why?

- For example, is there still a reliance on other systems and processes, such as spreadsheets, that will be adding cost to the business and are more prone to error?
- Is this through a lack of information or training or for some other reason (resistance to change)?

Was the project implementation successful?

- What lessons can be learned from this?
- What needs tweaking or rectifying?

What ROI does the business want to see in terms of cost reductions and savings in administrative time?

- If it's used for marketing and sales, is it generating more and better quality leads?
- How is it being used for customer engagement?

Are marketing and sales campaigns effective?

- Is there data duplication?
- How are web enquiries being handled?

Do staff feel empowered? (If not, this will impact productivity)

- Do they have the right tools?

HOW DO THE HEALTH CHECKS WORK?

The health checks typically take two to three hours to conduct.

STEP 1: One of our expert consultants will spend time with your team, discussing and reviewing the key areas of the application adoption process and where improvements can be made.

STEP 2: A report will then be produced and feedback presented back during a reporting and feedback meeting.

STEP 3: Depending on the recommendations and actions required, you may have to make a few tweaks to your CRM or you may require further support to make sure that the adoption process is completely aligned with your business strategy and processes. The actions required will be discussed during your reporting and feedback meeting.

BOOK YOUR CRM HEALTH CHECK TODAY

To arrange for one of our expert consultants to carry out a CRM Health Check, please call our sales team today on 01675 466 477.



About Crimson

Crimson helps organisations get the most from their investment in Microsoft cloud technologies. We take an iterative and agile approach that gives you the confidence to move forward. Crimson is part of the \$1BN global IT services group, Harvey Nash.

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