

CUSTOMER RELATIONSHIP HEALTH CHECK

Optimize your customer experience processes and reinvigorate your customer relationship culture.

A Customer Relationship Health Check provides a vision and an actionable road map to organizations looking to better understand and serve their current and future customers and to optimize the customer experience.

Investing in a customer relationship management (CRM) system and processes enables organizations to:

- Increase/drive revenue
- Offer relevant and contextual products and services
- Deliver those products and services efficiently and via channels of customer choice

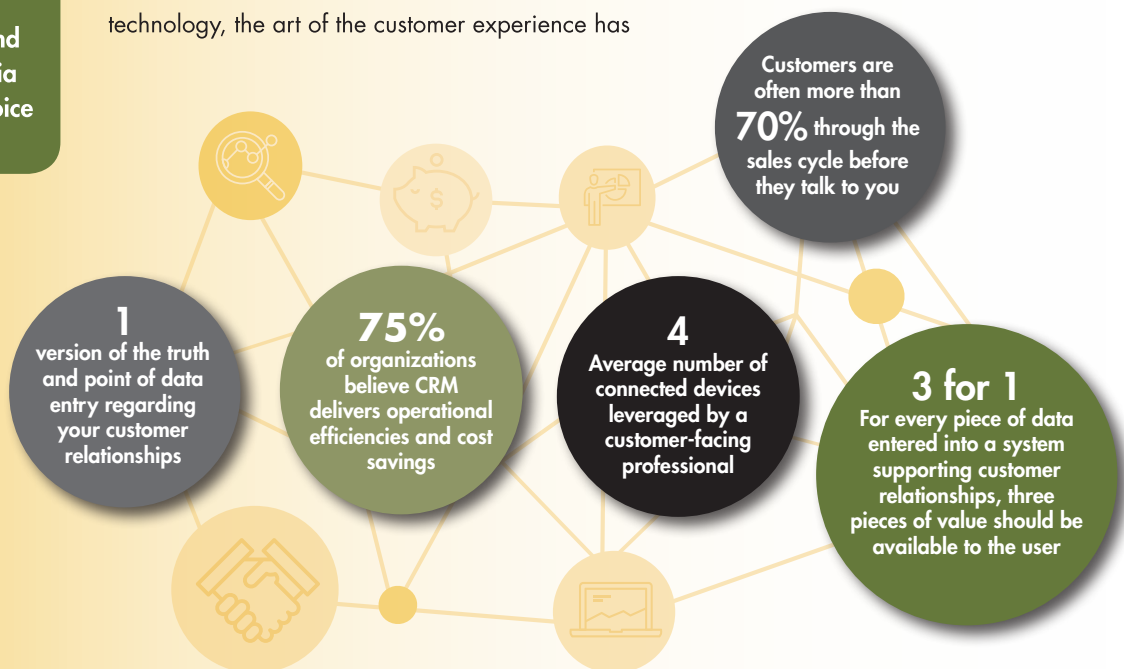
Gain insight into your most important relationships

Our Customer Relationship Health Check assesses the existing people, processes, and technology surrounding customer relationships and identifies gaps and future-state recommendations for alignment to and enabling of strategic goals and objectives.

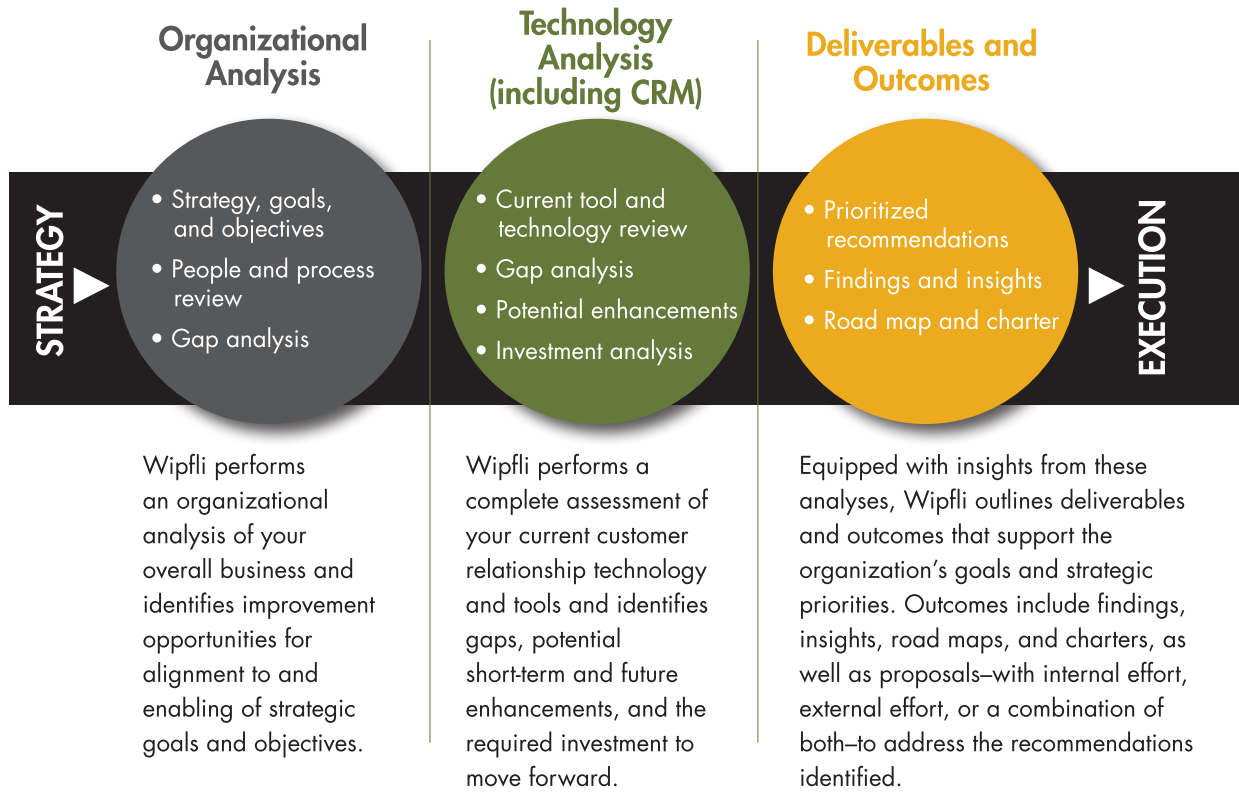
What organization is able to sustain, thrive, and grow without attention to its lifeblood: its people and its customers? With the advent and advance of technology, the art of the customer experience has

truly been transformed into the science of customer relationships. Today, technology can enable an organization to become more focused on its customer experience by providing actionable insights.

Our experience proves that optimizing customer processes through enabling and aligning technology solutions, including CRM, helps organizations realize and execute against these imperatives.



CUSTOMER RELATIONSHIP HEALTH CHECK



- Align customer relationship and experience processes with organizational strategies and goals
- Accelerate organizational growth by focusing on customer relationship and experience process optimization
- Access domain expertise and industry best practice analysis, deliverables, and outcomes

Health Check Options	STANDARD	SELECT	PREMIER
Customer Relationship Health Check (required)			
High-level organizational process review	•	•	•
Gap analysis	•	•	•
Prioritized improvement recommendations	•	•	•
Investment analysis		•	•
Business road map			•
Technology Health Check (optional add-on)			
Current tool and technology (including CRM) review	•	•	•
Gap analysis	•	•	•
Prioritized recommendations/improvement opportunities	•	•	•
Growth and CRM process review and detailed system review		•	•
Technology investment analysis		•	•
KPI and industry benchmark analysis		•	•
Interviews with relevant people/users			•
Interview/facilitated session notes			•
Expanded survey results (named or anonymous)			•
Customer road map (including CRM)			•
Charter, including organizational chart/roles analysis			•
Formal presentation of findings			•

Get started today!

If you would like to learn more about conducting a Customer Relationship Health Check for your organization, contact CRM@wipfli.com.

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