Time for a CRM Tune-Up?
Optimize Your CRM for Peak Performance

Tune-Up Plan

Regular inspections ☑

Every business has its own set of individual characteristics…

- department structures
- account management plans
- Sales methodologies
- established customer processes

…and its own special requirements needed to keep them on the road to success.

That being said, one of the elements that is common to all is the need for regular inspection and tune-up of CRM processes to improve and adapt to ever changing business environments.

In this e-book we will explore the present CRM landscape and encourage you to take a closer at your CRM strategies to improve business performance. Included is a checklist that you can complete online and print off for reference.

Are you overdue?

"We often find that companies are realising only a fraction of the potential that CRM provides. **One yardstick you can use is the recency of your latest innovation**: Gauge how long it's been since you last

tweaked your CRM to optimise reps' workflow. The longer it's been, the more likely that you're overdue."

Source: Jim Dickie — May 2010 issue of CRM Magazine
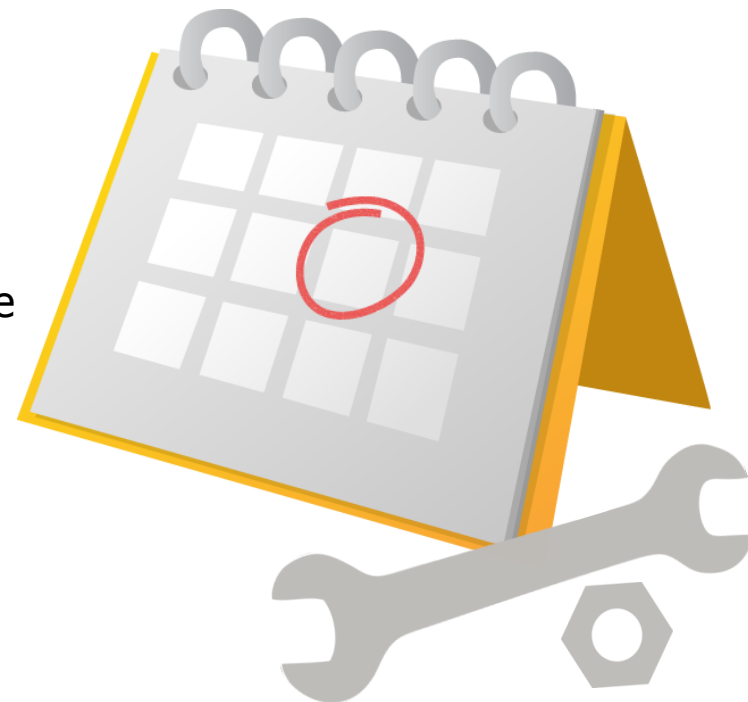
CRM landscape

CRM applications are evolving to meet changing business requirements. Here are some key trends in the present landscape:

1. **Mobility** – Real-time access to customer profiles, services cases and metrics via smartphones and tablets anywhere, anytime

2. **Real-Time Insight** – The ability to drive operational decision-making based on up-to-the-minute information through rich data sets and actionable intelligence
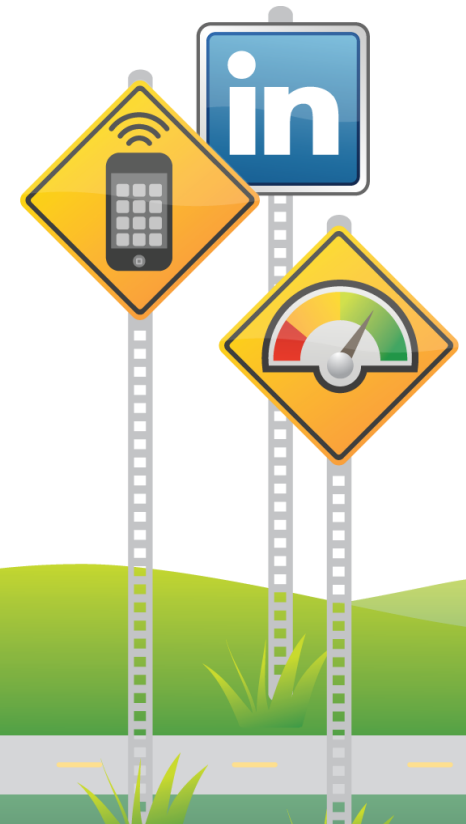
3. **Self-Service** – Executives and managers can create and modify dashboards and reports themselves as business needs arise without reliance on IT

4. **Social Media Capabilities** – CRM solutions integrate capabilities to leverage social media for enhanced customer interaction

5. **Knowledge Management Tools** – Customers and employees receive sought-for information from efficient self-service web-based knowledge base

How does your business compare?

Attendees of the 'Navigating Roadblocks with CRM' webinar series were polled to better understand business challenges and areas of improvement. The next few pages display the results associated with sales process, outbound marketing, customer service and measuring business performance…

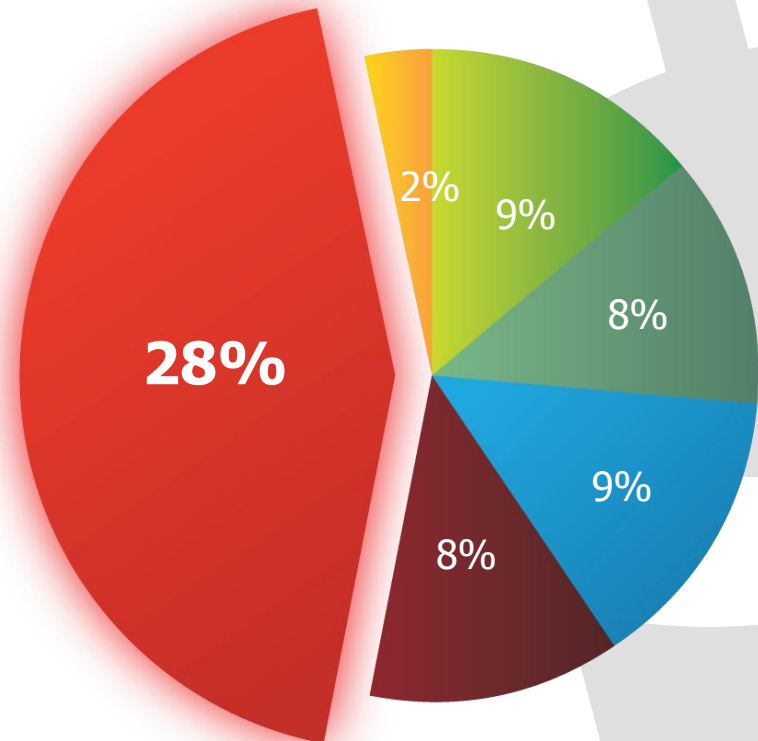Do you identify with the challenges?

How do you stack up against your peers?

Where do you need to improve?

Which area(s) of your **sales process** do you want to **improve**?

Improve sales forecast accuracy	9%
Reduce sales admin duties	8%
Shorten sales cycles	9%
Streamline sales reports	8%
Improve lead follow up	**28%**
Other	2%

What **challenge(s)** do you have with **outbound marketing**?

Targeting recipients with highly relevant content	32%
Quantifying email marketing ROI	23%
Lack of an effective email marketing strategy	**41%**
Inadequate staffing resources	32%
Lack of efficient email marketing process	36%

** Maximizer Software poll results from the 'Navigating Roadblocks with CRM' webinar series
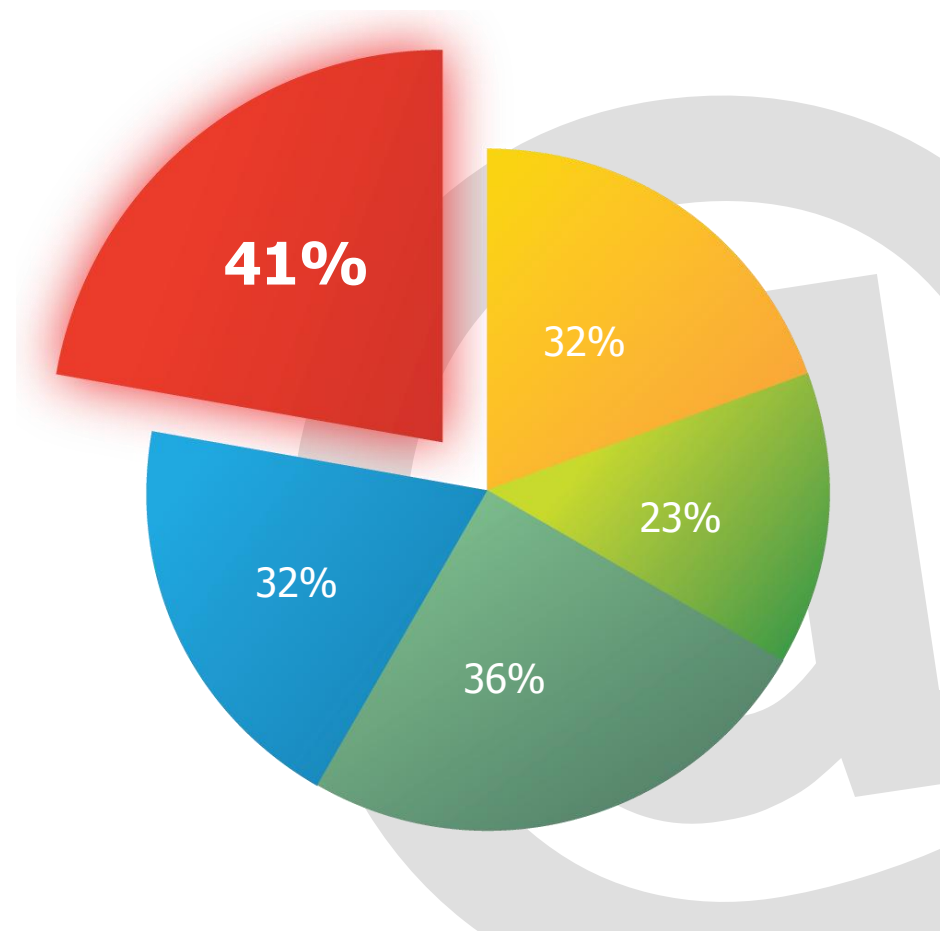
Which area(s) of **customer service** do you want to **improve**?

Streamline customer service processes — 26%

Measure customer service effectiveness — 30%

Track and manage service issues more effectively — 26%

Improve service resolution time — 19%

Increase productivity and efficiencies — 33%

Share customer information across staff & teams — 33%
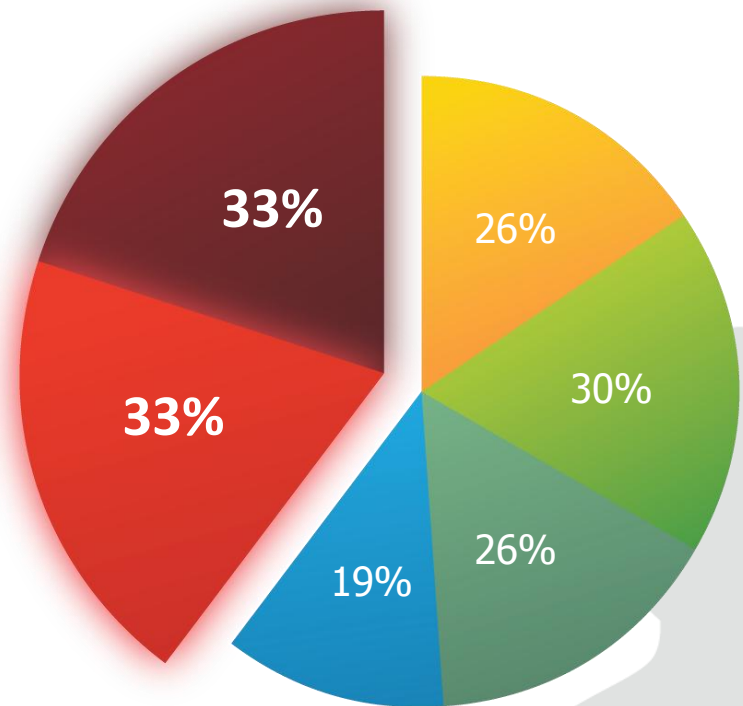
** Maximizer Software poll results from the 'Navigating Roadblocks with CRM' webinar series

What **challenges** are you facing in **measuring business performance?**

Inconsistent reporting requirements	45%
Time consuming analysis	25%
Inaccurate data included	40%
Lack of customized reports	**65%**
Analysis not relevant to my role	5%
Other	10%

** Maximizer Software poll results from the
'Navigating Roadblocks with CRM' webinar series
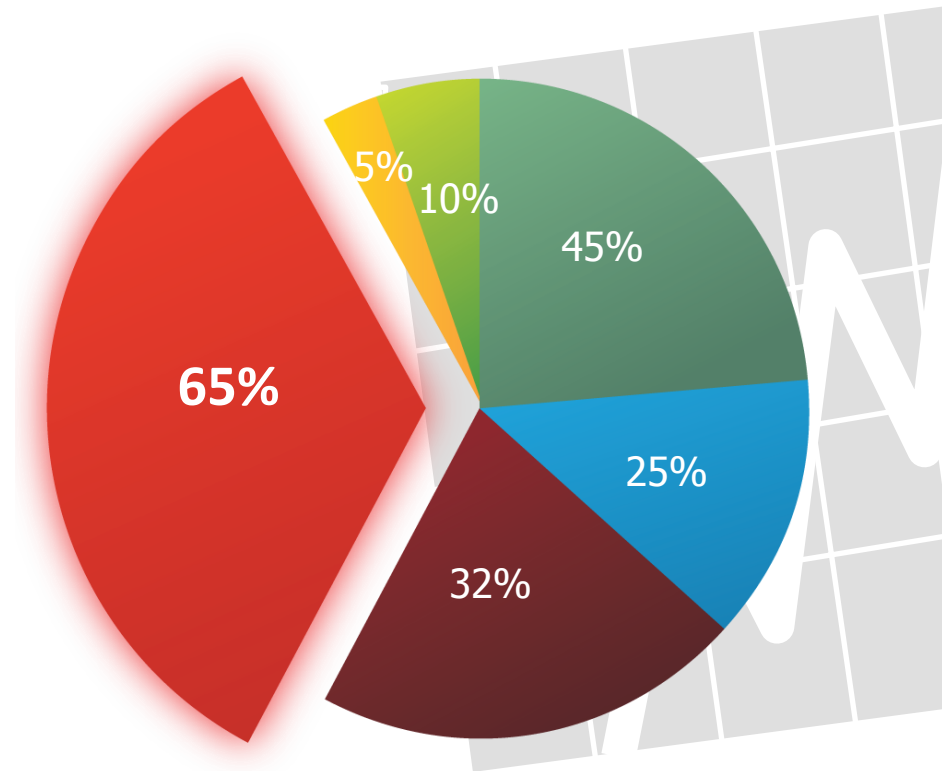
Evaluate your current condition

Being able to clearly understand your organisation's CRM obstacles and putting the tools and processes in place to overcome them is the path to achieving success.

Use this checklist to evaluate your current CRM situation and guide you in identifying opportunities for improvement.

To find out where you should be focusing your tune-up efforts rate your sales, marketing, customer service and business intelligence ability against each of the criteria.

Top Form

No tune-up needed

Needs Attention

Minor adjustments are necessary

Full Overhaul

Major adjustments are necessary

Not Required

Does not apply to your organisation

Sales Management

	Top Form	Needs Attention	Full Overhaul	Not Required
Do you have access to a 360 view of your customers?				
Are you tracking the status and source of each lead to measure funnel and conversion rate?				
Are you able to forecast sales accurately?				
Do you have visibility into sales team activity and performance?				
Do you have real-time access to customer profiles when out of the office?				
Can you quickly view priority tasks and progress towards sales goals?				
Are key performance indicators (KPIs) monitored to recognise trends and make adjustments?				
Do you have automated processes in place to reduce administrative burden on sales staff?				
Are you alerted to important changes in status of your most valued customers?				
Can you easily customise, create and share sales reports?				

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Marketing Management

	Top Form	Needs Attention	Full Overhaul	Not Required
Can you easily access and segment email data into targeted lists?				
Is your email marketing and campaigns managed within your core CRM?				
Do you know what type of email content your prospects respond to?				
Can you customise email content based on the needs of your target audience?				
Do you track a pre-determined action plan of steps for each campaign?				
Can you evaluate marketing spend by unique lead source and opportunity creation?				
Is your sales team able to easily identify which campaign was sent to which contact?				
Can you attribute marketing ROI from all campaign efforts?				
Can you easily access and share email campaign metrics?				
Are leads from your webpage immediately visible to your sales team?				

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Customer Service

	Top Form	Needs Attention	Full Overhaul	Not Required
Do you have a distinct and consistent process to manage customer concerns?				
Can you easily identify and track details of customer problems?				
Do you receive an automated alert when KEY revenue customers are having service issues?				
Are you automatically notified to overdue cases and other critical incidents?				
Can you quantify specific service issues, such as elapsed time and priority level to help focus your efforts?				
Can you easily customise, create and share customer service reports?				
Do your service and sales representatives share a centralised view of ALL customer information?				
Can you easily measure if your service levels our improving?				
Do you share incident resolutions and product-specific details across staff?				
Can you review and resolve customer service cases from your mobile device?				

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Business Intelligence

	Top Form	Needs Attention	Full Overhaul	Not Required
Do you have access to timely, accurate customer information?				
Are you capturing all the valuable information you need to improve your bottom line?				
Are you able to monitor performance patterns across all customer-facing teams?				
Can you easily identify who your most and least profitable customers are?				
Can you determine how much revenue to expect in the next quarter or year?				
Can you quickly analyse lead-to-opportunity and opportunity-to-close ratios?				
Are managers and executives automatically alerted when anomalies take place?				
Do you have access to critical business information from your mobile device?				
Can you easily and quickly create and share reports?				
Are you able to create and edit your own dashboards and reports?				

PRINT PAGE

6 tips for running smoothly

1   **Keep things simple** – Build from there

2   **Keep evolving your CRM** – CRM is dynamic

3   **Enter data with purpose** – Align fields with objectives

4   **Identify crucial data** – Make essential fields mandatory

5   **Learn short-cuts** – Utilise default & configuration options

6   **Automate processes** – Streamline repetitive manual tasks

Around the corner

NEXT STEPS

▶ Watch the **'How to increase productivity and boost profits using CRM'** WebCast

▶ Print your completed **'Evaluate your current condition'** checklists

▶ **Bookmark and share** this e-book

CAN WE HELP?

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