

THE 4 STAGE PROCESS TO SUCCESSFUL CRM IMPLEMENTATION



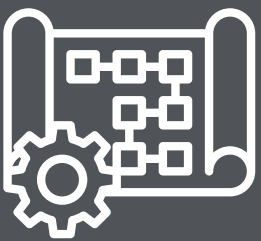
9 OUT OF 10 CRM IMPLEMENTATION EFFORTS FAIL TO SUCCEED

Don't overlook your typical CRM implementation challenges.

Instead, check out the 4 Stage CRM Implementation Process to realize maximum ROI.

SELECT THE RIGHT TECHNOLOGY & CREATE A CRM IMPLEMENTATION BLUEPRINT

1



Businesses need the right mix of technology, resources and support to experience CRM success.

And a clear blueprint helps all stakeholders know the plan, upcoming steps, and their responsibilities.

2

CUSTOMIZE THE TECHNOLOGY TO SUIT YOUR BUSINESS NEEDS



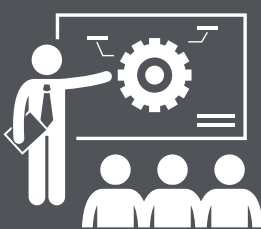
Understand your business's nuances in terms of

- Data Fields & User Control
- Software Integration
- Workflows & Automation

Communicate your customization requirements to your CRM partner and then, test the platform.

PROVIDE YOUR SALES TEAM WITH PROPER TRAINING AND SOME HANDS-ON EXPERIENCE

3

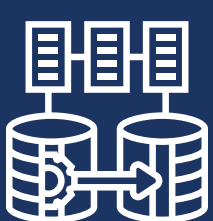


Proper training programs include documentation, videos, tutorials, and even one-on-one sessions for managers.

Then, let them experiment with the platform for some hands-on experience.

4

DATA MIGRATION AND GETTING STARTED ON YOUR GROWTH JOURNEY



Move the databases to the new sales CRM software and you are good to go.