

CRM Best Practices Implementation Assessment

Can identify obstacles to success & opportunities for improvement

Reasons to consider an Implementation Assessment

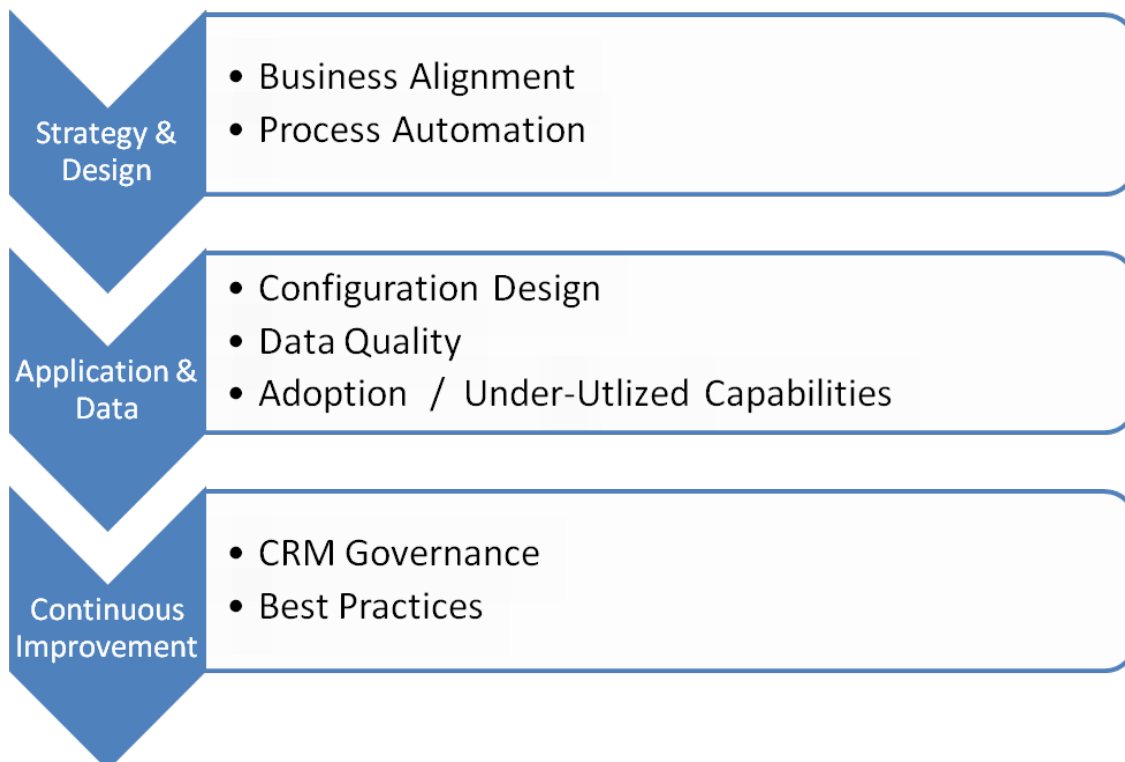
- Salesforce CRM was self-deployed or with limited expert assistance
- There has been a change in the system administrator(s) or champion in the last year
- There has been a change in executive or sales leadership in last 6 months
- Company underwent a re-organization, acquisition or merger

What will be accomplished

CRM Evangelist will review current business strategies, performance targets/goals, key business processes and the level of user adoption to track the overall effectiveness of your CRM system.

CRM Evangelist will evaluate and assess the overall performance of your CRM system, identifying factors which may be limiting the return you are seeing on the investment you have made.

Based on the information gathered, we will produce a CRM “Best Practices” Scorecard, which details our findings, highlighting areas where improvements can be made as well as documenting a set of prioritized actionable recommendations. This will give your organization a roadmap for future improvements and detail the value of the improvement and its associated ROI.



The deliverables includes:

A CRM “Best Practices” Implementation Scorecard. This document rates your deployment against common business best practices in the following key areas:

- Business alignment
- User adoption / change mgmt
- Data for quality analytics reporting
- Application configuration
- SaaS performance
- Process standardization
- Data quality and availability
- Continuous Improvement
- System design
- IT infrastructure

Recommendations overview:

This provides you with a set of actionable recommendations based on CRM standard “Best Practices”, which will help you to determine priority areas of investment in your CRM system in order to achieve greater value and real ROI.

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[CRM Readiness Assessment](#)

Use this tool to help you measure your organization's readiness for a CRM Program and/or CRM system implementation. Give your organization a score of 1-5 for each of the following questions. Check the SCORECARD tab for results & analysis.

Score 1 - Strongly Disagree
Score 2 - Disagree
Score 3 - Somewhat Agree
Score 4 - Agree
Score 5 - Strongly Agree

Senior Management Commitment		
	Score	Areas of Concern
Senior management understand CRM is a complex, long-term initiative.	1	
Senior management has committed to provide adequate resources to ensure success.	1	
Senior management is prepared to enhance current IT equipment to ensure that the CRM system is stable, reliable, and has been incorporated into disaster recovery plans.	1	

Alignment with Business Goals & Objectives		
	Score	Areas of Concern
There is a general trend in your industry to add or improve CRM systems.	1	
CRM is an initiative that has been stated in your enterprise strategic plan.	1	
Achieving success with CRM will help to achieve future enterprise goals.	1	
Senior management agrees that CRM is critical for meeting future goals.	1	
Each department has documented clear goals and deliverables for a CRM system.	1	
Senior management clearly understand CRM and how it can benefit the business.	1	

Level of Process Maturity & Documentation		
	Score	Areas of Concern
Defined, repeatable, and measurable processes are documented for Sales.	1	
Defined, repeatable, and measurable processes are documented for Marketing.	1	
Defined, repeatable, and measurable processes are documented for Customer Service.	1	
Defined, repeatable, and measurable processes are documented for Order Management.	1	
Defined, repeatable, and measurable processes are documented for Billing.	1	

Why Use CRM Evangelist to improve your CRM?

As a Silver Alliance Partner of Salesforce, we ensure your maximum performance with certified consultants who know the business of Service & Support. We are one of the most experienced partners with more than 8 years deploying Salesforce and more than 15 years deploying CRM.

Use CRM Evangelist to bring you the right solution for your business, accelerate your implementation and deliver rapid ROI with cloud based solutions.



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