



# 10 STEPS TO SUCCESSFUL CRM IMPLEMENTATION

## Introduction

Implementing a CRM system is an important strategic activity for businesses looking to improve customer relationships and increase overall efficiency. To ensure the success of your CRM implementation though, it's important to structure how you approach the task. By following the steps below, you can ensure that your CRM system is tailored to meet the specific needs of your business and drive meaningful results.

1. **Define clear goals and objectives:** Before implementing a CRM system, establish clear goals and objectives that align with your overall business strategy. For example, a car dealership may set a goal to increase customer retention by 20% within the first year of CRM implementation.
2. **Choose the right solution:** Choose a CRM solution that fits the unique needs of your business. A manufacturing company may prioritize automation and integration with other systems, while a service-based business may prioritize scalability and customization.
3. **Train your employees:** Train your employees to use the CRM effectively, such as entering, managing, and analysing customer data. A retail company may train their sales team on how to use the CRM system to track customer preferences and improve sales.



4. **Plan a data migration strategy:** To ensure a smooth transition, plan and implement a data migration strategy for transferring all relevant customer information to the new CRM. For example, a financial services firm may plan to migrate all client data from their old system to the new CRM system over a period of 6 months, or less.
5. **Establish clear roles and responsibilities:** Assign clear roles and responsibilities for CRM data management and ensure data is kept up-to-date. A marketing agency may assign a designated team member as the CRM administrator and set regular data review dates.
6. **Integrate with other systems:** Integrate the CRM with other relevant tools and systems such as marketing automation software, to improve data flow and automate tasks. As an e-commerce store, it's likely you'd want to integrate your CRM system with your email marketing platform to send personalized product recommendations to customers.
7. **Use data to improve:** Use the CRM system to track and analyse customer interactions and feedback, and use this information to improve your products or services. A restaurant, for example, may use their CRM system to track customer feedback on menu items and make changes accordingly.
8. **Monitor and measure success:** You can't improve what you don't measure. Monitor and the success of your CRM implementation and make adjustments as needed. A software company may track the number of leads generated through the CRM system and adjust their lead generation strategy accordingly.
9. **Continuously update and maintain:** Continuously update and maintain the system to keep it running smoothly and ensure that it continues to meet the needs of your business. A consulting firm may set a schedule for regular system updates and backups to ensure data security.
10. **Continuously seek feedback from users:** Continuously seeking feedback from users is an essential part of ensuring the ongoing success of your CRM implementation. It helps to identify areas where the system may not be meeting the needs of your users or where there may be issues that need to be addressed. A sales team may provide useful insights about how to improve logging of customer interactions.

Implementing a CRM can be a complex process that requires careful planning, attention to detail, and close monitoring. While each step of the process has its own set of nuances and intricacies, a structured approach will improve the success of the project. By following a well-planned, staged approach, businesses can ensure that their CRM implementation is successful, leading to improved customer relationships and increased efficiency. Ultimately, a carefully staged and monitored approach will help businesses achieve their goals and unlock the full potential of their CRM system.



## **STEP 1: DEFINING CLEAR GOALS AND OBJECTIVES.**

To get the most out of your CRM implementation, it's crucial to clearly understand what you want to achieve with the system and how it aligns with your overall business strategy. This begins with defining clear goals and objectives.

For example, if you're a car dealership and you're experiencing a high turnover rate among your customers, which is negatively affecting your bottom line, a goal for the dealership could be to increase customer retention by 20% within the first year of CRM implementation. This Specific goal is Measurable, Achievable, and Time-bound, which makes it a SMART goal.

Another important step in defining your goals and objectives is to consider the specific metrics that you will use to measure success. These metrics should be directly tied to your overall business goals and should be easy to track and measure. For example, if your goal is to increase customer retention, you could track data such as customer retention rate, customer lifetime value, and customer satisfaction. These measurements will help you in tracking the progress of your CRM implementation and make necessary changes if required.

Once you have defined your goals and objectives, create a detailed plan for how you will achieve them. This plan should include specific actions, timelines, and resources required to reach your goals. Involve all relevant stakeholders in the planning process, as this will ensure that everyone agrees and committed to the success of the project. This includes employees, management, and even customers, if possible. Getting input from different stakeholders will help in understanding their perspective and make the CRM implementation more effective.

Communication: Make sure your employees and other stakeholders are aware of the goals and objectives, and understand how they will be affected by the CRM rollout. This will help ensure that everyone agrees and is committed to success. Clear communication also removes any confusion or misunderstandings that can arise during the implementation process.

Setting clear goals and objectives is a critical first step in successfully implementing a CRM system. By identifying the specific challenges or pain points that your business is facing, defining metrics to track success, creating a detailed plan, and involving all relevant stakeholders, you can ensure that your project is aligned with your overall business strategy and will set your business up for success.

It is important to remember that the CRM implementation is a process and not a onetime event. Regular monitoring and review of the goals and objectives will help in achieving the desired results.



## **STEP 2: CHOOSING THE RIGHT SOLUTION.**

Choosing the right CRM for your business can be a daunting task. In this article, we'll cover the key considerations that you need to make when selecting your CRM. With so many CRM options in the market, choosing the best one that meets your business's unique needs can be challenging.

For instance, if a business opts for a CRM solution that does not align with its type of business, it may not be able to track the relevant information, leading to ineffective decision-making. For example, a manufacturing company deciding to implement a CRM designed for retail businesses might result in the system not having the ability to track inventory or production schedules, which are crucial for manufacturing.

When selecting a CRM solution, it's important to consider the specific requirements of your business and the industry you operate in. Going back to our example of the manufacturing company: this business may prioritize automation and integration with other systems, such as enterprise resource planning (ERP) or supply chain management (SCM) systems, to streamline production and logistics processes. On the other hand, a service-based business may prioritize scalability and customization to meet the diverse needs of its customers.

Consider the size and structure of your organisation, as well as the level of technical expertise of your employees. Some CRMs are geared towards small businesses, while others are designed for larger companies with more complex needs. Similarly, some CRM solutions are more user-friendly and require minimal technical expertise, while others require more advanced knowledge and training to fully use.

Another important factor is the level of integration and customization. Some CRMs are highly customizable, allowing businesses to tailor the system to their specific needs. This is important for companies that have unique processes or specific

requirements. However, this can also make the implementation process more complex and time-consuming. Some CRM solutions are more out-of-the-box, with fewer customization options, but are typically easier to implement and use.

Another key feature to look for is the system's scalability. As your business grows, you'll need a CRM that can grow with you. Scalability is essential for businesses that expect to expand their customer base or add new products or services. A scalable solution will help to ensure that you're able to manage and organise your customer interactions effectively, even as your business expands.

**Cost.** Carefully evaluate the total cost of ownership, including the initial investment and ongoing expenses such as support, maintenance and upgrades. Some CRMs are available as a cloud-based service, which can be a more cost-effective option for small businesses. Other CRM systems are available as an on-premises solution, which may be more suitable for larger organizations with more complex or regulatory needs.

Consider the level of support and maintenance offered by the CRM vendor or your consultant. A good vendor will provide a high level of technical support and help during the implementation process, as well as ongoing support and maintenance.

Last, it's essential to evaluate the level of data security and privacy that the system offers. In today's digital age, data security and privacy are of the utmost importance, and it's essential that your CRM system is able to protect your customer and sales data from unauthorized access and breaches.

Choosing the right CRM solution for your business can be a complex process, but by taking the time to consider the specific requirements of your business and the industry you operate in, you can ensure that you select a system that meets your needs.



## **STEP 3: TRAINING YOUR STAFF.**

Implementing a Customer Relationship Management (CRM) system is a crucial step for any business looking to improve its customer engagement and overall performance. However, it is not only important to choose the right CRM solution, but also to ensure that your employees are trained to use the system effectively. Training employees on how to use the CRM system is crucial for the success of the implementation process.

One of the key aspects of training employees on how to use the CRM system is to ensure that they are proficient in entering, managing, and analysing customer data. This includes understanding how to input customer information, create customer profiles, and update customer information as needed. It also includes training on how to use the system to track customer preferences, purchase history, and other important data that can be used to improve sales and customer service.

If working with an implementation partner, make sure they can describe how they will run their training plan, and how they check to make sure your users acquire the necessary skills. Look for documented processes and examples of training material.

For example, a retail company may train their sales team on how to use the CRM to track customer preferences and improve sales. This could include training on how to use the system to identify potential upsell and cross-sell opportunities, as well as how to use the data to create targeted marketing campaigns. Additionally, the sales team can be trained on how to use the system to track customer interactions, such as phone calls and emails, to improve communication and follow-up with customers.

Employees need to understand how to analyze customer data. This includes training on how to use the system's reporting and analytics tools to gain insights into customer behavior, preferences, and trends. This information can be used to

make data-driven decisions, such as identifying which products or services are most popular, where to focus marketing efforts, and how to improve customer service.

It is also important to ensure that employees are trained on how to use the system's workflow and automation features. These features can help to streamline business processes, such as lead management and sales forecasting, as well as improve communication and collaboration within the organization. This can help to increase productivity and improve overall performance.

To ensure that employees are effectively trained on how to use the CRM system, it is important to develop a comprehensive training plan. This plan should include a combination of online tutorials, in-person training sessions, and on-the-job training. It should also include ongoing support and resources, such as user manuals and helpdesk support, to ensure that employees can continue learning and improving their skills as they use the system.

In summary, training employees on how to use the CRM system is crucial for the success of the implementation process. By ensuring that employees are proficient in entering, managing, and analysing customer data, as well as understanding how to use the system's workflow and automation features, businesses can improve their customer engagement and overall performance.



## **STEP 4: PLAN A DATA MIGRATION STRATEGY.**

One of the biggest challenges in implementing a CRM system is migrating all relevant customer information from the old system to the new one. To ensure a smooth transition, it is important to plan and implement a data migration strategy.

The first step in developing a data migration strategy is to assess the current state of your customer data. This includes identifying what data you have, where it is located, and how it is currently being used. It is also important to assess the quality of the data, as well as any potential issues or challenges that may arise during the migration process.

Once you clearly understand your customer data, identify what data needs to be migrated to the new CRM system. This includes customer contact information, purchase history, notes, interactions, and any other relevant data that will be used to improve customer engagement and overall performance.

Plan the actual migration process. This includes identifying the most efficient and effective way to transfer the data from the old system to the new one. There are several options available for data migration, such as manual data entry, data import, or data integration. The choice of method will depend on the size and complexity of your customer data, as well as your technical expertise and resources.

For example, a financial services firm may plan to migrate all client data from their old system to the new CRM system over a period of 6 months or less. This may include using a combination of manual data entry and data import to transfer customer information, such as contact information, account information, and transaction history, to the new system. This approach will allow the firm to ensure

that the data is accurate and complete while minimizing disruptions to the business.

It is also important to consider the timing of the migration. The migration process should be scheduled when it will cause the least disruption to the business, such as during a slow period or over a weekend. For some organisations or those with highly complex environments, this staged approach may not be possible. In which case you'd need to consider dynamic migrations where data is pushed from one live system to another, allowing for uninterrupted business operations.

It is also important to communicate the migration plan to all relevant parties, including employees, customers, and vendors, to ensure that everyone is aware of the changes and how they will be affected.

To ensure that the data migration process is successful, test the new system before going live. This includes testing the data migration process, as well as testing the system's performance, security, and compatibility with other systems.

Finally, it is important to have a plan in place for data clean-up and maintenance after the migration is complete. This includes removing duplicate data, updating inaccurate information, and regularly backing up the data to ensure that it is protected in case of any issues.

A data migration strategy is an essential step in implementing a CRM system. By assessing the current state of your customer data, identifying what data needs to be migrated, planning the migration process, and testing the new system before going live, businesses can ensure a smooth transition and improve customer engagement and overall performance.



## **STEP 5: ESTABLISH CLEAR ROLES AND RESPONSIBILITIES.**

Implementing a CRM is often a large business change, involving many people, changing process and often infrastructure. There are lots of moving parts. For a CRM implementation to be successful, it is essential to establish clear roles and responsibilities, manage stakeholders effectively, and ensure good governance throughout the project.

The first step is to assign a project manager who will oversee the CRM implementation.

The project manager will coordinate the efforts of all team members and stakeholders, and for ensuring that the project stays on schedule and within budget. They will also act as a liaison between the team and upper management, ensuring that everyone is kept informed of the project's progress.

It's important to assemble a diverse team of stakeholders from different departments and levels within the organization.

This team should include representatives from the IT department, sales and marketing teams, upper management, and key stakeholders, such as customers and partners. This will ensure that all perspectives are considered and that the implementation aligns with the overall goals and objectives of your business.

The IT department, working with your implementation partner, will be responsible for the technical aspects of the project, such as data migration and system integration. The sales and marketing teams will be responsible for inputting and managing customer data in the CRM system. It's also important to have a plan for training and educating all stakeholders on the new CRM, so they can effectively use it once it's running.

Stakeholder management is also crucial for successful CRM project. Regular meetings between team members and stakeholders can help to ensure that everyone is on the same page, and that any issues or concerns are addressed in a timely manner. Involve stakeholders in the analysis of current processes and workflows, as well as in the measurement and tracking of the implementation's success.

Good governance is essential to ensuring a successful project. This includes establishing a clear project plan, regular reporting on progress, and a system for measuring and tracking the success of the implementation. It also includes ensuring that all stakeholders are aware of their roles and responsibilities and that they are accountable for their actions.

Overall, the key to successful CRM implementation is to establish clear roles and responsibilities, manage stakeholders effectively, and ensure good governance throughout the project. With the right approach, a CRM system can bring significant benefits to a business, including improved customer engagement, increased sales, and greater efficiency.



## STEP 6: INTEGRATION WITH OTHER SYSTEMS.

Integration is a crucial aspect of any CRM. It helps businesses streamline their processes and ensures that they have access to all the information they need to make informed decisions. In this post, we'll look at the benefits of integration for your CRM.

- **Improved Data Quality:** Integrating with other systems, such as your ERP or marketing automation tool, helps to improve data quality. All information is stored in one central location, reducing the risk of errors and duplicates.
- **Increased Productivity:** Connecting your CRM system with other tools means that employees no longer have to switch between multiple systems to complete tasks. This saves time and increases productivity.
- **Better Customer Insights:** Integrating with data from other systems, such as your website, social media channels, and marketing campaigns, provides a complete view of the customer journey. This helps businesses understand their customers better and make informed decisions.
- **Enhanced Collaboration:** Email and project management systems, when integrated with a CRM enhance collaboration among employees. Team members can access information and communicate in real-time, improving the overall efficiency of the team.
- **Cost Savings:** The need for separate licenses and reduces the number of systems that need to be maintained when you integrate into a centralised source of truth, such as CRM. This leads to cost savings for the business.

Integrating a CRM into a business's existing technology can be complex and carry certain risks though. One of the biggest challenges is ensuring that the integration is seamless, and that data is correctly transferred between systems without any errors. Another risk is compatibility issues between the CRM and other existing systems, which could lead to system downtime or data loss.

To mitigate these risks, thoroughly plan the integration process, including identifying potential issues and developing a contingency plan. It is also advisable to work with a professional integration consultant who has experience with integrating CRM systems and can provide expertise on the best practices and potential risks. Businesses should test the integration thoroughly before it goes live to ensure that it works as expected and that all data is being transferred correctly.

Regular maintenance and monitoring of the integrated systems is also crucial to ensure the system continues to function smoothly. This includes backing up data, updating software, and ensuring that all systems are running optimally. By taking these steps, you can minimize the risks associated with CRM integration and ensure that their system works as expected to drive their success.



## STEP 7: DATA-DRIVEN IMPROVEMENT STRATEGY.

A CRM is an essential tool for any business looking to streamline customer interactions and improve their overall customer experience. However, the real value of a CRM lies in the data it collects. When used correctly, this data can help drive better business decisions and support continuous improvement.

Here are some tips for using a CRM to implement a data-driven improvement strategy for your business:

1. **Define your goals:** Before you begin, it's important to understand what you hope to achieve through your data-driven improvement strategy. This might include improving customer satisfaction, increasing sales, or reducing costs. It is important to define specific, measurable, attainable, relevant, and time-bound (**SMART**) goals for your strategy to ensure you clearly understand what success looks like and can track progress towards it.
2. **Collect the right data:** To make informed decisions, you need access to the right data. Ensure that your CRM is capturing all the data that applies to your goals. This might include customer demographics, purchase history, and feedback. Consider integrating your CRM with other systems, such as your marketing automation platform or your customer service software, to ensure you have a complete view of customer interactions.
3. **Analyse the data:** Once you have the data, it's time to analyse it. Look for trends, patterns, and insights that can help you make better decisions. Use visualization tools and dashboards to help you see the big picture and identify areas for improvement. Look for correlations between customer data and your business outcomes, such as increased sales or reduced churn.

Advanced analytics techniques, such as machine learning algorithms, can also uncover hidden patterns in your data.

4. **Take action:** With the insights gained from your data analysis, it's time to take action. Use your findings to inform new business strategies and tactics. Change your customer service processes, product offerings, or marketing campaigns based on the data you've analysed. Consider A/B testing your changes to ensure that you are making improvements based on data-driven insights.
5. **Monitor and evaluate:** Finally, it's important to monitor and evaluate the results of your data-driven improvement strategy. This will help you determine whether your actions have had the desired impact and make any necessary adjustments. Regularly review your data and track key performance indicators (KPIs) related to your goals to ensure you are on track to achieve them. Consider using automated reports and dashboards to keep track of your progress and make it easier to identify areas for improvement.

By using a CRM to implement a data-driven improvement strategy, you can stay ahead of the competition and continuously improve customer experience. Whether you are a small start-up or a large enterprise, using data-driven insights can help you make better decisions and drive growth for your business.



## STEP 8: MONITOR AND MEASURE SUCCESS.

Measuring the success of your CRM implementation is crucial to ensure that your investment is delivering the desired outcomes and providing value to your business. Here are 10 important factors to measure and their explanations:

1. **Adoption rate:** The adoption rate measures the number of users actively using the CRM regularly. A high adoption rate indicates that the CRM is user-friendly, providing value to users, and is being used to its full potential.
2. **User satisfaction:** User satisfaction is a critical factor in determining the success of your CRM implementation. Collect feedback from users on the ease of use and overall satisfaction with the CRM to identify areas where improvements can be made.
3. **Data quality:** The quality of the data being entered into the CRM is critical to ensuring that you are making informed decisions. Measuring data quality can help you identify areas where improvements can be made to ensure that the data being used is accurate and up-to-date.
4. **Time savings:** The automation of tasks and processes within the CRM can save significant time compared to manual methods. Measuring the time savings can help you quantify the impact of the CRM on productivity and identify areas where additional time savings can be achieved.
5. **Improved customer engagement:** The CRM can play a key role in improving customer engagement by streamlining communication and increasing response times. Measuring the impact of the CRM on customer engagement, such as increased customer satisfaction and sales, can help you determine the value being delivered to your customers.

6. **Lead generation and conversion:** The CRM can be used to generate leads and track the conversion rate of those leads into sales. Measuring this can help you identify areas where improvements can be made to the sales process and increase lead generation and conversion rates.
7. **Sales and revenue:** The impact of the CRM on sales and revenue is a key factor in determining the return on investment (ROI) of the implementation. Measuring the impact of the CRM on sales and revenue can help you understand the value being delivered to your business.
8. **Customer retention:** The CRM can be used to improve customer retention by providing a more personalized customer experience. Measuring the impact of the CRM on customer retention, such as reduced churn rate and increased customer loyalty, can help you determine the value being delivered to your customers.
9. **Improved collaboration:** The CRM can improve collaboration between team members by providing a centralized platform for communication and decision-making. Measuring the impact of the CRM on collaboration, such as improved communication and increased efficiency, can help you understand the value being delivered to your team.
10. **Integration with other systems:** The integration of the CRM with other systems, such as marketing automation platforms or customer service software, can provide additional benefits by streamlining processes and improving overall efficiency. Measuring the level of integration and the impact of these integrations on overall business processes can help you determine the value being delivered by the CRM.

Measuring the success of your CRM implementation is crucial to ensure that your investment is delivering the desired outcomes. By regularly monitoring and evaluating the factors outlined above, you can make the correct decisions to improve your processes continuously and maximize the value of your investment.



## **STEP 9: CONTINUOUSLY UPDATE AND MAINTAIN.**

A Customer Relationship Management (CRM) system is a vital tool for managing customer interactions and data, but its value can quickly become limited if it's not continuously improved and optimized. Having a continuous improvement plan in place is critical to ensuring that your CRM continues to support the developing needs of your business and deliver the best possible outcomes. In this blog post, we'll explore why it's critical to have a continuous improvement plan for your CRM and provide examples of how to implement it.

### **Stay Current with Technology Advancements**

Technology is constantly evolving, and CRM systems are no exception. By having a continuous improvement plan, you can stay current with technology advancements and ensure that your CRM system is equipped with the latest features and capabilities to support your business needs. For example, you can implement a regular review process to evaluate new CRM technology and determine if it would improve the efficiency and effectiveness of your current system.

### **Enhance Customer Experience**

Providing a positive customer experience is a key driver for success in any business. Ensure that your customers are receiving the best possible experience through streamlined communication and easy interaction with your business. As an example of this, you can gather customer feedback and use it to improve the user interface, automate repetitive tasks, and implement new communication channels.

## **Improve Data Accuracy**

Data is a critical component of any CRM system, and the accuracy of that data is critical to making informed decisions. By continuously improving your CRM, you can ensure that your data is accurate, up-to-date, and properly synced between systems. You could implement a data quality control process that involves regular data cleaning, validation, and standardization.

## **Stay Compliant with Regulations**

Regulations and data privacy laws are constantly changing, and it's important to ensure that your CRM system complies with these regulations. Stay current with the latest regulations and ensure that your system provides the security controls to protect sensitive customer data. Regularly review your CRM security protocols and implement new ones to align with the latest regulations and best practices.

## **Increase Efficiency**

Continuous improvement of your CRM can help increase efficiency by providing new automation tools and features that streamline processes and reduce manual work. This can free up time for your team to focus on more strategic tasks and improve overall productivity. Evaluate current processes and identify areas where automation can be implemented to improve efficiency.

## **Better Return on Investment (ROI)**

Investing in a CRM system is a significant investment for any business. By continuously improving your CRM, you can ensure that you are getting the maximum ROI from your system. By staying current with technology advancements, improving data accuracy, and increasing efficiency, your CRM will continue to deliver value to your business.

## **Stay Ahead of the Competition**

In today's competitive business environment, it's essential to stay ahead of the competition by delivering a better customer experience, improving data accuracy, and increasing efficiency. For example, you can regularly review the best practices and innovation in your industry and identify areas where you can differentiate and innovate your CRM approach.

A continuous improvement plan is critical to ensuring that your CRM continues to support the growing needs of your business and deliver the best possible outcomes. A CRM system is only as valuable as the data it contains and the processes it supports. By having a continuous improvement plan in place, you can ensure that your CRM system is always providing the best possible support to your business, customers, and teams.



## **STEP 10: GET USER FEEDBACK.**

In our final post in this series on the 10 steps to successfully implementing a CRM, we'll be discussing the crucial element of seeking feedback from users.

One of the most important steps in successfully implementing a CRM is to continuously seek feedback from users. This is essential for identifying areas where the system isn't meeting the needs of your users or where there may be issues that need to be addressed. Without this feedback, it's difficult to know where to focus your efforts to improve the system and ensure its ongoing success.

One key area where feedback can be valuable is in the logging of customer interactions. For example, if a sales team is complaining about the difficulty of logging customer interactions, it is important to take this feedback into account and adjust the system. This could involve simplifying the process, providing more training on how to use the interaction log feature, or even considering a different CRM solution that better meets the needs of your sales team.

Another important aspect of seeking feedback is to make sure that you are reaching out to a diverse group of users to get a range of perspectives. This can include employees from different departments, as well as external stakeholders, such as customers and partners. By gathering feedback from a broad range of users, you can gain a more comprehensive understanding of the system's strengths and weaknesses and make more informed decisions about how to improve it.

One way to gather feedback is by hosting regular user forums or focus groups. This can be an effective way to get a wide range of feedback in a relatively short period. You can also create a feedback form or survey that can be completed by users. This allows you to gather feedback regularly and track progress over time.

It is also important to act on the feedback you receive. This means not only listening to what users have to say but also taking action to address any issues that are raised. This could involve changing the system, providing additional training or support, or even bringing in outside experts to help address specific problems. By acting on feedback, you can show users that their input is valued and that you are committed to making the system as effective as possible.

Seeking feedback isn't a onetime event, but an ongoing process. CRM systems are constantly evolving, and user needs and expectations are also changing. By continuously seeking feedback, you'll ensure that your CRM remains relevant and valuable to your organisation.

Seeking feedback from users is an essential part of ensuring the ongoing success of your CRM implementation. It helps to identify areas where the system may not be meeting needs or where there may be issues that need to be addressed. By acting on this feedback, you improve the system and ensure that it remains a valuable tool. Remember to reach out to a diverse group of users, act on the feedback received, and make it an ongoing process.

# ABOUT CRM STRATEGY

USING BEST IN CLASS TECHNOLOGY SOLUTIONS TO SOLVE COMPLEX  
BUSINESS CHALLENGES FOR OVER 25 YEARS

CRM Strategy is an Australian CRM consultant and technology agency.

With over 26 years' experience solely developing CRM solutions in Australia across many industry verticals, we've delivered hundreds of successful projects.

We offer CRM consultation services and bespoke CRM system design, including full support, mentoring, and training.

We partner with industry leading technologies including Sugar CRM, Zoho and Amazon and have a full time Australian-based staff comprising Analysts, Data Scientists, and custom CRM developers, all supported by a friendly and dedicated Customer Success Team.

We offer CRM solutions for small business, large enterprise, and businesses in-between.

We're business-first, technology second.

We'd love to help you win.

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## Testimonials:

“My experience of the team broadly at CRM Strategy is positive. From an organisational sense, we have felt supported, listened to, and that CRM Strategy values working with us despite probably being at a smaller scale than many other customers you work with. There is clearly a culture of collaboration, focusing on solutions, actively listening to client needs and balancing the technical with the functional outcomes. I noticed very quickly the improvement in project documentation, resource and sprint planning and the leadership across the team members (less siloing and more transparency about who was working on what with us). From our perspective, it’s clear CRM Strategy has a great team of technical people that work hard for their clients, including us.”

**Sage Michaels, Projects Delivery Manager, Early Learning Association Australia**

“Sequoia Superannuation employed CRM Strategy for a long, complex project to improve our current systems with absolutely minimal disruptions to clients and staff operations. They have achieved both of these requirements whilst offering guidance and constructive suggestions along the way. Being able to understand our problem and actively assist us to improve, is vastly different from doing just what we ask. The latter has far less value, the former is invaluable. Thanks Brett, Jac & Team. Keep it up.”

**Brent Jones, Director, Sequoia Financial Group**

“I have found CRM Strategy to be a very knowledgeable and supportive company built around sound expertise and a strong passion for CRM solutions. They openly listen to our challenges, are very willing to assist and then work collaboratively to find a solution. Communication is excellent and we are informed every step of the way by providing clear resolution pathway, budget and timings. Over the past few years, we have developed a strong relationship built around open, honest and transparent conversations that has developed a level of trust and comfort to continue on for years to come.”

**Pablo Neira, Strategy & Innovation Manager, Doctor's Health Fund**