



CRM ASSESSMENT SERVICE



As your business expands and evolves, and complexity increases, investing in an evaluation of your people, process and CRM technology is a valuable way to prepare for future growth.

Tom Mescall
Partner
925 790 2812
Tom.Mescall@armaninoLLP.com

Ryan Prindiville
Strategy & Transformation Practice Leader
925 790 2833
Ryan.Prindiville@armaninoLLP.com

Armanino's CRM Assessment Service provides a holistic review of your CRM system, including people, process, and technology.

Our team of consultants possess extensive experience and expertise in CRM solutions, business process design and technology strategy to help companies increase productivity and profitability. We empower your organization to deliver the kind of customer experiences that grow revenue, loyalty and your bottom line.

The Armanino Advantage

Many companies today have CRM installations that do not meet their needs, often because the software is not integrated with the rest of the technology ecosystem or doesn't support the unique requirements of their industry and business. Armanino's team of seasoned consultants uses our proven methodology to understand your current state, document your business needs and desired future state and develop a roadmap to ensure your CRM platform helps you achieve those goals.

Through Armanino's CRM Assessment Services, we empower your organization to improve productivity, enable collaboration, and gain insight and control across business processes including:

- Sales force automation
- Marketing and marketing automation
- Customer service and call center
- Field service
- Social media sentiment analytics
- Enterprise social collaboration
- Mobility and mobile application support
- Technology ecosystem integration

Assessment Types

Health Check – A preliminary targeted consultation to evaluate the current condition of your CRM system or specific needs and requirements for a new CRM Solution

QuickStart – A rapid but thoroughly scoped assessment that goes into deeper detail through onsite stakeholder interviews, analysis of current strategy and processes, and evaluation of current systems or technology.

Comprehensive – Inclusive of everything the QuickStart Assessment offers, the Comprehensive Assessment goes a step further to evaluate the entire ecosystem surrounding the CRM system. We focus on the integration of the CRM system with other systems and how your CRM affects the entire organization across people, process, and technology.

Why Choose Armanino?

As your business expands and evolves and complexity increases, streamlining and improving your CRM system and processes is a valuable way to prepare for future growth. Armanino's Strategy & Transformation consulting services are grounded in years of hands-on experience. We can help you when you are experiencing VUCA – Vulnerability, Uncertainty, Complexity and Ambiguity.