



# CRM Maturity Action Plan

WORKSHOP – 4 DAYS

[XRMVISION.COM](http://XRMVISION.COM)

# Elevate your CRM usage and increase your business efficiency by evaluating the maturity of your CRM system.

Based on the Capability Maturity Model, XRM Vision's methodology will allow you to assess the level of CRM maturity of your business processes. We will help you create an action plan that will increase your CRM maturity level. By helping you increase your CRM maturity level, you will be able to create more leads, deepen your customer relationship and increase the likelihood of future business.

By starting an operational optimization project with a CRM maturity analysis, we will:

- Prioritize changes that have immediate positive effects on the company's activities
- Engage employees in change by making their day-to-day tasks more effective
- Ensure that the company is ready to receive each wave of change
- Measure the expected benefits for each process improvements

## AGENDA

- ◆ Day 1 – Enterprise
  - Business and contacts management processes
  - Analysis of you Key Performance Indicators (KPIs)
- ◆ Day 2 – Sales
  - Lead management
  - Opportunity management
  - Sales and customer service process
- ◆ Day 3 – Customer Service & Marketing
  - Case management including queues and escalation
  - Technical support management
  - Consulting Services and customer satisfaction servicez
  - Marketing, web tracking, social media and event management
- ◆ Day 4 – Governance
  - Configuration strategy and standardization
  - Data collection and reporting
  - Future maintenance and update activities
  - Presentation of the visual model of your CRM maturity

## DELIVERABLES

Analysis of the status of your CRM maturity presented within a visual model

Roadmap showcasing the next steps, best practices and priorities to ensure your CRM and business evolution.

Founded in 2008 in Montreal, XRM Vision is a human-sized CRM consulting firm driven by expertise and commitment. We specialize ourselves in creating and implementing Customer Relationship Management solutions, powered by the Microsoft Dynamics 365 universe.