

March Second

Advancing the Value of Marketing™

M² CRM Audit Services

Overview

You're not realizing value you expected from your investment in your CRM solution. You spent millions of dollars implementing the solution, countless months, maybe years, rolling out the applications, and hours upon hours in training end-users. Even with all of this invested time and money, you still are not getting what you want out of your CRM solution. Sales people are not using the system. Management is not getting the reports they need. Even your customers are beginning to sense your frustrations. You can't just pull the plug and switch to another solution – you have traveled too far and too long. You are at your wits end.

You are not alone.

March Second can help you.

Approach

March Second's M² CRM Audit is a structured and comprehensive assessment designed to evaluate the effectiveness of your CRM solution and help you maximize benefits of your CRM investment.

Our tailored 30-day assessment includes interviewing and surveying key executives, managers and users of CRM including sales management and sales representatives, product and customer marketing teams, customer service, and marketing partners. We focus on understanding the key functional, technical, process, data, and usability challenges the business is facing with the CRM solution and identify what better would look like. We understand that each person uses CRM applications differently based on their role, so we tailor our approach to address specific questions including:

- What is the single biggest problem with your CRM capability that is impacting your success today?
- What information and functionality is required for you to meet your business objectives?
- What are the top 5 system related obstacles impacting your success?
- What are the top 5 benefits of using your CRM solution?
- What 5 things you could do previously that you cannot do with your CRM solution?
- What 5 things you can do today with your CRM solution that you could not do before?
- Describe your training on your CRM solution – was it adequate? How could it be improved?

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Upon conclusion of the interviews, you will receive a comprehensive assessment that will provide:

- A detailed set of requirements and how those requirements are addressed by the CRM capabilities you have today
- Specific recommendations on what better would look like and how the current CRM solution can or cannot meet your needs
- A user adoption strategy that includes education and training programs to ensure end-users are leveraging the capabilities to the fullest and benefiting from the solution
- A roadmap on what processes, technologies, capabilities, and data needs to be changed and when it should be implemented. If you would like, we can even help you implement the recommendations.

Summary

Most CRM solutions are complex and address numerous CRM needs including sales force automation and contact management, marketing campaign management and analysis, customer service, and channel and partner management.

It takes seasoned CRM strategy, process, and technology experts to ensure you are implementing it correctly and to help you get the most out of your CRM investment. March Second has the skills and experience to help you now.

Please contact us at info@marchsecond.com or call us at 978-208-4281. Check out our other marketing technology and solution services at www.marchsecond.com.