

## CRM OPTIMIZATION

WEDNESDAY, JULY 25<sup>TH</sup> 8:30 - 11:30 AM



### LEARNING OBJECTIVES

- Understand how to properly evaluate CRM platforms
- Discover what steps need to be taken prior to implementation
- Understand the right structure to support implementation success
- Discover solutions for collaboration and long-term success
- Learn how to remove the sting from typical training pains

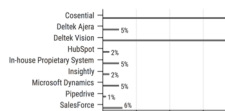
## SMILE IT'S PICTURE TIME



### EVALUATE CRM PLATFORMS

### EVALUATION OF SYSTEMS

- Competitive Analysis Worksheet
- Survey/Research Results
- Checklist to Assist with Evaluation
- Supportive Material or "Ammo"



CRM Competitive Analysis Worksheet

Feature	Requirement	Centennial	Deltek Vision	HubSpot	In-house Proprietary System	Insightly	Microsoft Dynamics	Pipedrive	Salesforce
Cloud Based	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Mobile Access	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Integration	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Reporting	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Customization	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Scalability	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Security	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Support	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Training	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Implementation	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Integration	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
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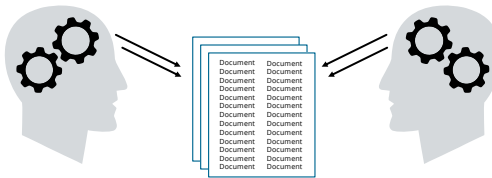
All CRM efforts need to be in line with the main purpose of marketing and business development ...  
**winning** and **keeping** clients!

## PRIOR TO IMPLEMENTATION / RE-IMPLEMENTATION

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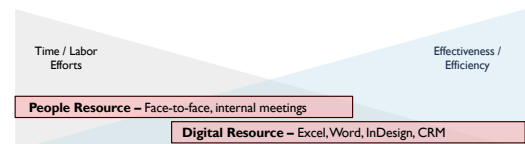
- Know your firm's why and how you will use it
- What are the benefits for your firm
- Who are your champions and users
- Build and nurture a culture of change

## FIRM'S WHY AND USE OF THE SYSTEM



## BENEFITS OF A CRM

- 1 Access to Centralized Data
- 2 Smart, Categorized Data
- 3 Effective and Efficient



## IDENTIFY YOUR CHAMPIONS AND USERS

- 1 Champions  
- Influential, Non-Influential  
- No Champion
- 2 Responsible Department
- 3 Users



## BUILD AND NURTURE A CULTURE OF CHANGE

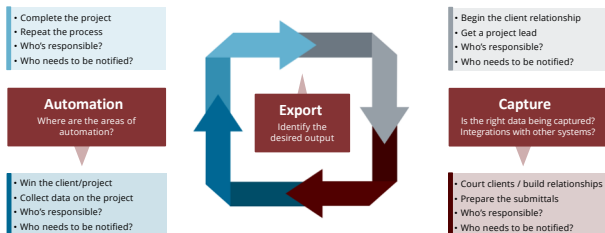
- 01 Slow down to go FAST  
Document and pay it forward
- 02 Actions are contagious  
Encourage others to join you
- 03 Market your CRM  
Campaign the change  
Communicate, communicate, communicate

## STRUCTURE FOR A SUCCESSFUL IMPLEMENTATION

## PHASES OF A SUCCESSFUL IMPLEMENTATION



## Phase 4 - Export



Client Name: ISD  
 Opportunity Name: Additions to 3 High Schools  
 Geographic Location: Dallas  
 Business Unit: Dallas  
 Market Sector: Education  
 Proposal Due Date: January 11, 2018  
 Est. Selection Date: February 26, 2018  
 Est. Start Date: August 27, 2018  
 Est. Completion Date: June 07, 2019  
 Date Contract Signed:  
 Estimated Cost: \$18,000,000.00  
 Estimated Fee: \$0.00  
 P&P Bonded (Yes/No):  
 Est. Size: 75000  
 Deliverable: RFP/RFP  
 Contract Type: Conventional (G/C)  
 Construction Type: Expansion  
 Delivery Method: CM@R

### Workflow Notification Example

Email sent to accounting when an opportunity is won

Personnel Name	Staff Team Role	Role Type	Involved	Description
Vice President	Executive	100%		

Role	Company	ID	Address	Phone Numbers	Company Type(s)	Comments
No companies have been associated with this project						

Link to opportunity record: <http://cscope.us/cw/NTAM/CSMA/>

## CHECKLIST RESOURCES



- ✓ Questions for the Process
- ✓ Process Mapping Checklist
- ✓ Notification Examples

## REMEMBERTO...

Prioritize  
Your Goals




Review  
Your Map

Celebrate  
Your Wins



#### IDEAS, MISTAKES AND RESULTS



-  Training Session Ideas
-  Training Mistakes
-  Survey Results

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Thank you for attending, please reach out and connect!