

Wheel of CRM™

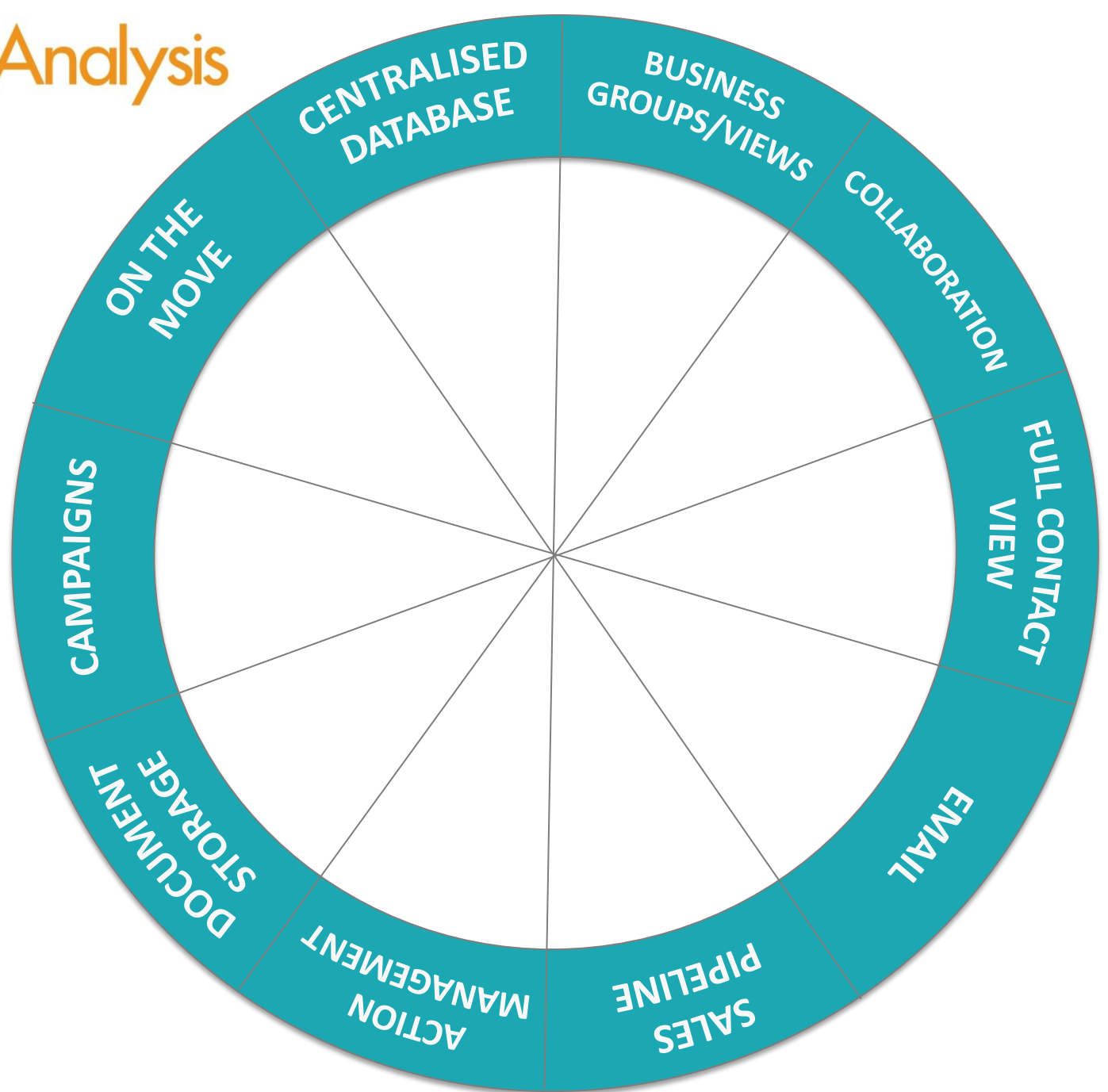
This exercise will enable you to find where your pain points are in relation to business data management



Instructions

- ★ Start by looking at the categories around the wheel. Every category is a feature that can be provided by a good CRM system
- ★ Before you start, read through the **Definitions** page to make sure you know what is meant by all the terminology used
- ★ Step through each category around the wheel and rate each one between 1-10. (1 being this isn't so good and 10 being you have this covered). Refer to the **Question** pages to guide you
- ★ Mark each score (as a number) on the edge of each segment
- ★ When you have scored all of the categories, draw a line across the segment at the point of that score (refer to the **Example Wheel of CRM™**)

WHEEL OF CRM™



Definitions

- **Lead** | A person that you have the potential to do business with (showing some interest in your service or product)
- **Prospect** | A lead that has progressed to become a likely customer – you have discussed a product and pricing
- **Opportunity** | A deal that is associated with a person or organisation. This is a sale – the project/product/service that you are delivering
- **Customer/Client** | A person/organisation that you have done business with. They have purchased from you at least once
- **Organisation** | A company, an account (this organisation has one or more people associated with it)

Questions:

On a scale of 1-10 rate each of these areas. Mark that rating on the relevant segment of your Wheel of CRM™

- **Centralised Database** | How well is your business information currently organised? Is it all in one place: contacts, customers, leads, prospects, opportunities (deals)?
- **Business Groups/Views** | How well is your business information classified? Can you access information about those classifications quickly? For example: do you have your customers grouped by industry, source, size or preferences?
- **Collaboration** | How good are you at sharing information across your team or providing access to your information to virtual assistants? Can everyone in your organisation see and contribute to your client files electronically?

Questions:

On a scale of 1-10 rate each of these areas. Mark that rating on the relevant segment of your Wheel of CRM™

- **Full Contact View** | How much of the information about your contacts, customers and leads is all in one place and allows you to see the full view of a contact? (such as address, social media, emails, tasks, history, notes and documents)
- **Email** | Are you using professional, enterprise level email for your business (or are you still using free Pop3/IMAP email)? Is your email integrated with your CRM/database so that you only have to enter contact details once?
- **Sales Pipeline** | Are you capturing every lead and following up on them? Do you capture details as soon as you get a new lead? How easy is it to access your lead information quickly to make sure you haven't lost an opportunity for a sale?

Questions:

On a scale of 1-10 rate each of these areas. Mark that rating on the relevant segment of your Wheel of CRM™

- **Action Management** | Can you organise your tasks, actions, meetings, emails etc. from one place? Can you link these actions to specific customers, leads or opportunities? Do you have a system that reminds you to do these things?
- **Document Storage** | How secure are your confidential documents relating to your clients, leads and prospects? Can you access them quickly when you are updating a person's information? Are they all stored in one place along with the person's information? If your laptop was stolen would the thief be able to access your documents on the hard drive? Are you complying with the Data Protection Act by ensuring your confidential information is not at risk?

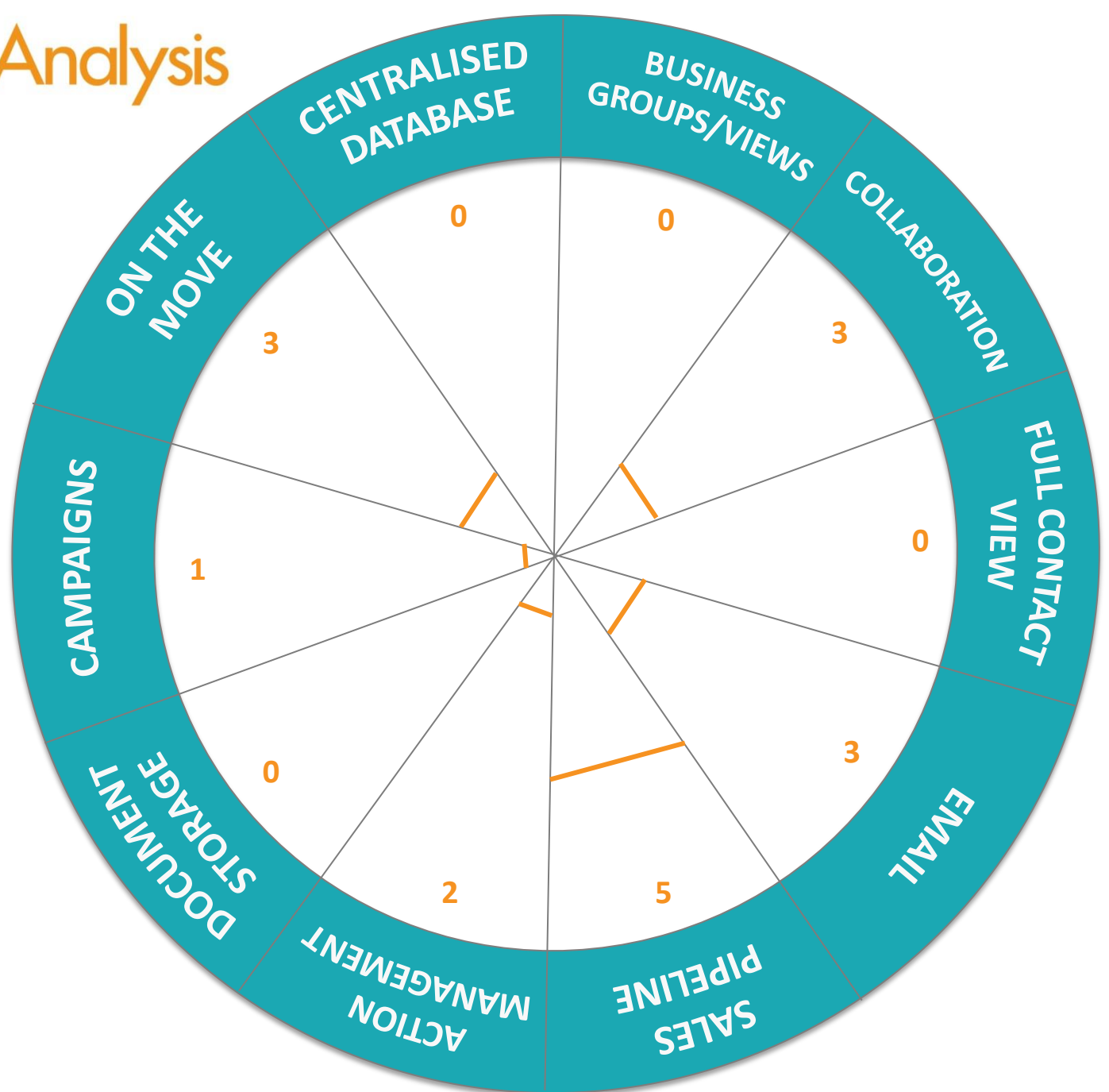
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On a scale of 1-10 rate each of these areas. Mark that rating on the relevant segment of your Wheel of CRM™

- **Campaigns** | Are you sending structured email campaigns that follow a strategy, and provide analytics on the response times? Can you send campaigns directly from your database/CRM without having to export data and import the data into a mailshot provider (such as MailChimp)? If a person opts out of your email marketing is this automatically captured in your database or internal record for that person?
- **On The Move** | Can you access all of your information when you are out and about (away from your desk)? Can you access information from your mobile or tablet?

EXAMPLE

A complete
Wheel of CRM™



Review Your Wheel

- ★ Where is your flat tyre?
- ★ Can you see your pain points?

★ Now ask yourself these questions:

How much more effective would your business be if these scores were 8, 9 or 10?

What impact would that have on your business sales or existing customer relationships?

How much time could you save?

Do you want to be chained to all of the contact details that pile up on your desk?



Or do you want to relax with a coffee with access to your business information from anywhere at any time?