

## CRM Roadmap™

### Paving Your Way to Successful Customer Relationship Management

The business benefits for investing in Customer Relationship Management (CRM) are compelling. Streamlined business processes, more productive employees, and happy, loyal customers can ultimately lead to higher profitability and increased market share for your company. However, successful implementation is highly dependent on careful and informed decision-making, and requires buy-in from the entire organization, especially senior management. Making critical decisions about CRM, and achieving consensus on those decisions, can be extremely difficult - and making incorrect or uninformed decisions, or proceeding without consensus can be costly.

Innoveer's CRM Roadmap™ program can help you achieve your goals — quickly and efficiently — by providing the CRM expertise you need to make the right decisions, and the guidance to help you obtain consensus across the three critical dimensions required for success: business, technical and organizational.

#### ARE YOU A CANDIDATE FOR CRM ROADMAP?

- Are you having difficulty reaching consensus on what you want to accomplish with CRM?
- Do you have the technical and organizational infrastructure, architecture, environment and operational requirements in place for implementing CRM?
- Do you know what CRM package/vendor is best for your specific functional needs and budget?
- Do you have a business case in place that outlines your total cost of ownership and the business benefits you can expect to receive?

#### WHAT IS CRM ROADMAP?

Innoveer's CRM Roadmap is a set of short, quick, strategic activities designed to help you get through the critical decision-making process, obtain the necessary buy-in, and plan, implement and manage successful enterprise CRM. Facilitated by seasoned CRM professionals with deep, hands-on experience, these activities accelerate the decision-making process and increase the effectiveness of your CRM initiative.

#### WHY DO YOU NEED IT?

Analysts estimate that approximately two thirds of all CRM initiatives get derailed for reasons that are entirely preventable. CRM Roadmap helps you address common problem areas — such as lack of consensus, and process and infrastructure issues — to keep your CRM initiative on track. Plus, a day wasted results in sales and customers lost. Without a means of efficiently and effectively capturing and acting on your customer information, sales and customer relationships can suffer — and so can your bottom line. That's why speed to CRM implementation is critical. Innoveer Solutions helps you take the right direction toward CRM — quickly.

## CRM DIRECTION

Consensus around critical issues is foundational to successfully moving forward on the path to CRM. We help you build this consensus by identifying and bringing together business and technical owners in your organization who need to be involved in the decision-making process. We work with them to clearly identify the business drivers for CRM and help them understand what to expect from CRM. We then help you negotiate solutions around priorities and products, and decide which groups should participate in CRM, and what the critical success factors are that must be met. At the conclusion of this exercise, you'll have a CRM vision, objectives and critical success factors, as well as an action plan for next steps.

## CRM READINESS

This high-level technical and organizational assessment of your organization helps you determine your operational and technical preparedness for implementing CRM. We evaluate your existing architecture and environment, organizational structure and operations, sales methods and customer service culture — all in the context of what you are trying to achieve through CRM — and identify the organizational and technical elements you need to have in place in order to support a comprehensive CRM solution.

## BUSINESS CASE

We perform a high-level financial analysis that estimates your net total cost of ownership and compares it to the realistic business benefits (both objective and subjective returns) that can be gained from your CRM investment. We work in collaboration with members of targeted business units, IT management, and financial staff in your organization to develop a business case that provides you with a list of business benefits to be expected and investment options that will justify your investment and yield the greatest business return.

## TECHNOLOGY VALIDATION

We help you identify the criteria that a CRM application must have in order to satisfy your organization's specific needs, both current and long-term. Through workshops and vendor demonstrations, we then help your team target specific CRM platform products (as well as specific technology solutions such as CTI, database and middleware packages) and create a scorecard that rates them according to their established criteria. Based upon the scorecard, your team — not Innoveer Solutions — makes the final decision, and presents its package recommendation to your organization for investment approval. The choice is yours; we simply help show you the way.

## PROGRAM DEFINITION

We work with you to identify who needs to be involved and in what capacity, and who will manage the overall program. We also help you determine the specific parameters for each CRM implementation phase, including which business units will receive what functionality, and the timeframe and deployment approach for implementation. Deliverables include an overall program plan as well as a detailed project plan for your first implementation phase.

## CRM ROADMAP: Proving Your Investment

Implementing CRM is a significant financial investment. Innoveer's CRM Roadmap will help you get the most out of that investment by avoiding costly mistakes, purchasing the right product, preparing your technology and organizational infrastructure, and rapidly achieving promised business benefits.

## ABOUT INNOVEER SOLUTIONS

INNOVEER SOLUTIONS, an award-winning customer strategy and solutions consultancy, provides advanced customer management services to healthcare and high-technology companies, among others, in the areas of planning and strategy, technology implementation, and optimization. The company's deep industry knowledge, broad technical skills, and Multishore methodology enable organizations to address their critical customer-facing issues and achieve an integrated view of all customer information. With an exclusive focus on customer management since 1998, Innoveer has worked with more than 300 organizations to increase their overall business growth, improve internal efficiency, and enhance the customer experience.

## CONTACT US

For more information about how Innoveer Solutions can help you with your CRM Roadmap, please contact Jennifer Yanoff at [jyanoff@innoveer.com](mailto:jyanoff@innoveer.com) or at +1 617-225-7914.

