

Maximize the lifetime value of your customer relationships

CRM Checklist:

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1) When is the right time to implement a full scale CRM System?

- A) Not Sure
- B) Immediately

CRM is a key factor for your business process, if you are asking when is the right time for a full-scale CRM system, this probably means you need one. CRM Systems will improve your organization's business process, your sales pipeline and customer engagement.

2) How could you benefit from an in depth view of your sales pipeline?

- A) Somewhat
- B) Significantly

CRM helps you to view your sales pipeline more clearly. The benefits of this are unparalleled; customer knowledge is a key factor to develop growth and maintain your current customer relationships. CRM systems develop sales reports that include critical information this instantly improves your business capabilities.

3) How do your sales people manage customer relations?

- A) Could be better
- B) Well

CRM provides your sales people with the skills they need to juggle a large number of clients. Customizable CRM solutions improve your sales teams' natural sales abilities. A flexible CRM software solution streamlines the front office business processes that directly impact sales execution and customer service.

4. How can you improve your customer support services and activities?

- A) Implementation
- B) Enhance current system

Customer knowledge and information is important when you are developing customer support services and activities. Often organizations do not realize the importance of customer knowledge and forget to listen to their customer needs. CRM Systems immediately enhance your organization's listening capacity, by tracking your customers' needs, purchases and communication over time in order to develop a report outlining your customer needs. CRM provides you with the tools to develop your customer support services and activities.

5. How simply can you generate forecasting reports?

- A) With difficulty
- B) With ease

Generating reports manually can waste time. Often human error can occur which will mean that real information may be missing from the report, which could be harmful for your organization in the long run. A CRM system can generate reports easily and for differing market segments. These customizable CRM systems automatically improve your organization's forecasting reports quickly and efficiently.

6. How effectively are you targeting top customers?

- A) Insufficiently
- B) Sufficiently

Through the use of CRM your customer information is increased. This can be used effectively to target new leads and then convert these leads into top customers. Attempting to target top customers without current customer knowledge would be a waste of time and could have a negative effect for your organization.

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7. How effectively are you allocating your people budgets and resources?

- A) Sufficiently/ Not at all
- B) Effectively

Through reports generated by a CRM system you can manage your budgets and resources safely and efficiently, resulting in an effective allocation of both budgets and resources.

8. How quickly are you responding to customer inquiries?

- A) Monthly
- B) Weekly

Organization is a key factor when responding to customer inquiries. If you are unable to respond to customer queries swiftly, you are at risk of damaging your customer relationship. CRM systems immediately log correspondence with your customers. This helps you to keep track of customer inquiries and improves your customer service abilities.

How did you score?



Mostly A's

You are in need of a CRM system in order to develop and enhance your customer relationships. Watch these [CRM demo videos](#) and instantly see how you can develop your organization's CRM system.

Mostly B's

Your customer relationship management is good but can always be improved. Why not check out our free [CRM Best Practices ebook](#) to see how we can help you enhance your current CRM system.

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