CRM Utilization Policy

Purpose

To communicate clear expectations of CRM Usage within the company, ensuring consistency, reliability, and adoption.

Scope

This policy applies to all divisions.

Principles

The CRM is our main repository for all Leads, Opportunities, and sales interactions. It will be used as the main tool for all customer-facing associates to effectively sell, service, and communicate with external parties related to our sales efforts.

When in doubt, let the following guide you - <u>"If it is not in CRM, it doesn't exist."</u>

Policy Details

<u>Managing Contact Information</u>

The CRM will provide the company with a comprehensive view of the company's knowledge of, relationship to, and interactions with both contacts and their organizations with which we do business. We will create and maintain up-to-date Account & Contact information for the organizations with which we interact.

<u>Tracking Communications</u>

To better service our customers/partners and provide our associates with a 360-degree view of our customers, we will

- Document any meaningful or initial communication with any customer, dealer, or partner in CRM (e.g., meetings, emails, text messages, phone calls, etc).

- Link/relate all documented communication to appropriate Lead/Contact/Opportunity.

- Memorialize relevant internal communications using either chat or email.

Calls

In today's business climate, various channels are utilized to communicate with customers and partners. For the sake of posterity and internal alignment, we must capture key communications into the "corporate memory." For phone, text, or other non-email, digital correspondence:

- Record all meaningful non-digital communications utilizing the CRM's "Log a Call" feature
- Chatter can also be used to memorialize communications with internal associates.

Meetings

Meetings with customers and partners are a critical component of our sales process. The information gathered from these meetings often provides the roadmap for forging stronger relationships and winning new business. These meetings also provide invaluable market feedback, which can assist others in the organization to discover trends, identify new opportunities and generally improve our products and services.

- For all Meetings with reps and customers, we will log Call Reports to memorialize the players, topics covered, issues/requests/opportunities raised, and any action items for follow-up.

Generating Quotes

Quotations play an important role in both facilitating sales and providing the company with insight into the performance of its products and partners. Because we sometimes sell through reps and/or distribution, our visibility to channel performance, market penetration, won/lost deal status can be indirect. We can infer much from the type, origin, and flow of quotes we receive. As such, ensuring that all Quotes are captured, tracked, and dispositioned is key to providing us with good information from which to make decisions.

- All domestic product quotations must be done in CRM.
- Where approvals are required, they will be tracked in the CRM.

Managing Opportunities

Opportunities

Opportunities are valuable data points that help to shape the sales pipeline and give visibility to sales prospects. Each opportunity takes different shapes and forms with varying levels of coordination required.

- Regional Managers will take the primary role of tracking their business and ensuring that business is passed on to the appropriate distributors and that our end users are getting the service and support they expect.

- All Opportunities will be updated weekly with a clear Next Step and realistic Close Date.

Dispositioning Opportunities

- When an Order is received, the Inside Sales team will update the corresponding Opportunity's stage as Closed/Won, and record the PO# on the Opportunity.

- Upon learning about Opportunities being lost, the sales team will document the Lost Reason and include in Chatter any observations as to how to improve our chances for similar future prospects

Service Management (Cases)

Some divisions will use the CRM Case System to document product performance and issues reported by our customers (warranty or non-warranty).

- All relevant communications with the customer on a Case must be documented in CRM.

- Statuses of Cases are to be monitored regularly to ensure open & outstanding Cases are followed up and to ensure that customer satisfaction levels are maintained.

- Case documentation (including problem explanation, interaction, and resolution) should be thorough, detailed, and clear. Photos from the customer should be attached in all situations where they can be reasonably obtained.

Roles and Responsibilities

- [Role of CRM Administrator goes here]
- [Role of CRM Ambassadors go here]
- [Role of Steering Committee goes here]

Data Ownership and Confidentiality

- [Define data ownership rules]
- [Specify levels of data confidentiality]
- [Outline procedures for handling sensitive information]

Misc Usage Guidelines

- [Insert restrictions and prohibited actions (e.g., exporting data without authorization)]

Related Documents

- Link to Accepted Use Policy
- [insert Work Instruction docs here]

History

Version	Date	Author	Notes
v1.0	6/9/2022	D. Reif	Initial version