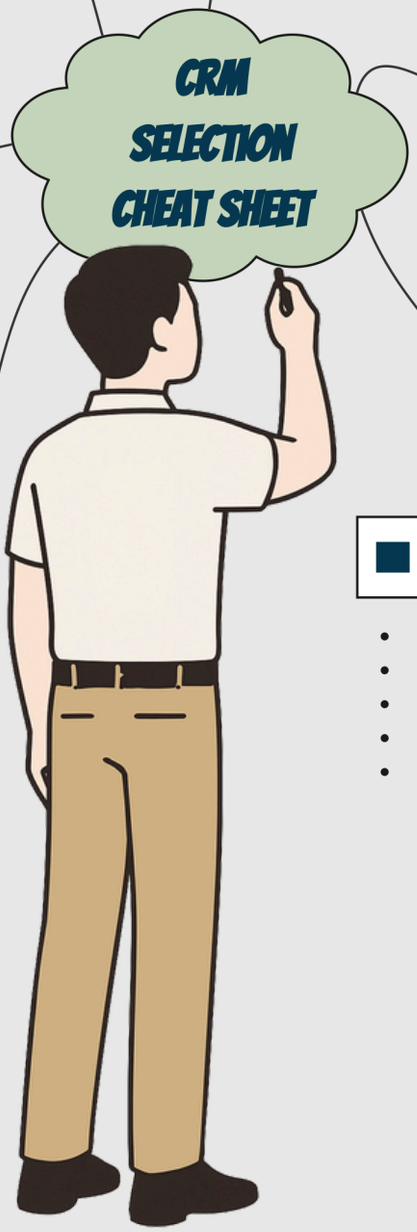
CRM Switch

CRM Buyer's Cheat Sheet



Planning & Readiness

- Secure an executive sponsor early
- Adopt a phased implementation approach
- Form a cross-functional CRM selection team

The CRM Workshop

- Validate stakeholder input
- Build awareness
- Resolve open questions
- Confirm project scope
- Establish definition of CRM success

Selection Team

- Key departments and roles
- Project lead and subject matter experts
- Influential skeptics
- Clarify responsibilities
- Consider an independent CRM consultant

CRM Scorecard

- User Experience Process
- Support Information
- Retrieval Email
- Integration Reporting &
- Dashboards Mobile
- Experience

CRM Blueprint

- Business Objectives
- Future CRM Capabilities
- Capability Map
- Application Ecosystem
- Customer Touchpoints
- Success Factors Pain Point
- Catalog Process Catalog
- User Stories Integration
- Requirements

Tailored Demos

- Share the CRM Blueprint
- Pre-brief Sales Engineers
- Schedule Demos Close Together
- Flag Add-Ons that cost extra
- Use Scorecards

Choosing the Right CRM Starts Here