

# Convoko CRM Solutions

Correctly evaluating, mapping, and implementing your business processes and CRM technology is the cornerstone of your company's success.

## CRM Evaluations

A CRM Performance Review (CPR) is a comprehensive review and evaluation of your CRM technology, associated processes, and how your organization uses them to manage all of your customer interactions.

A CPR consists of in-person, on-site, working sessions between Convoko experts and customer stakeholders. In these sessions, the team:

- Identifies the business areas that require improvement
- Prioritizes the opportunities for improvement
- Determines solution complexity and value.

With the opportunities for improvement identified, we logically organize them into solution initiatives. The result is a clear picture of how to improve both your business processes and your CRM performance. Now that we know "what" should be done, next comes the "when" and "how".

Every company is in a different CRM lifecycle stage ...  
**START-UP, STEADY STATE, GROWTH, OR DECLINE.**

Convoko CRM Solutions follow a consistent methodology that will optimize your business and improve your CRM capabilities regardless of which CRM lifecycle stage your company is in today.

## CRM Roadmaps

The CRM Roadmap outlines the sequence and timeline, the "when" and "how", your business and CRM performance will be improved.

The CRM roadmap takes into account the complexity and value of the objectives and aligns them to create the most successful CRM implementation plan. To create a CRM Roadmap we:

- Assess the desired process capabilities and impacts
- Define the required technology solutions and integration points
- Confirm the future CRM solution architecture
- Generate the CRM improvement program and project plan

With the roadmap and timeline complete, the result is a comprehensive, phased CRM implementation plan that presents a clear picture of "when" and "how" the various projects get done.

## CRM Projects

The CRM Project manages the delivery of the CRM Implementation, as well as any Interaction within other corporate programs. We offer three main CRM implementation approaches:

1. The Proof of Concept (POC) is a useful implementation approach to test or try a solution with a selected process or user base as a pilot program.
2. The CRM Implementation is the approach most commonly used when the future state objectives of the business and the CRM are known and defined.
3. A CRM Optimization project is a useful implementation approach when CRM processes and systems require enhancements, but not a complete overhaul. It is more limited in scope and often targets a specific functional need or group of users.

To ensure the most successful implementations, every Convoko CRM engagement evaluates your business; people, process, and technology. Regardless of the project selected, the final results for your company are improved business processes, world-class CRM capabilities, well trained employees, and a continuous improvement model to ensure your long-term success.

## At the Heart of Your Business

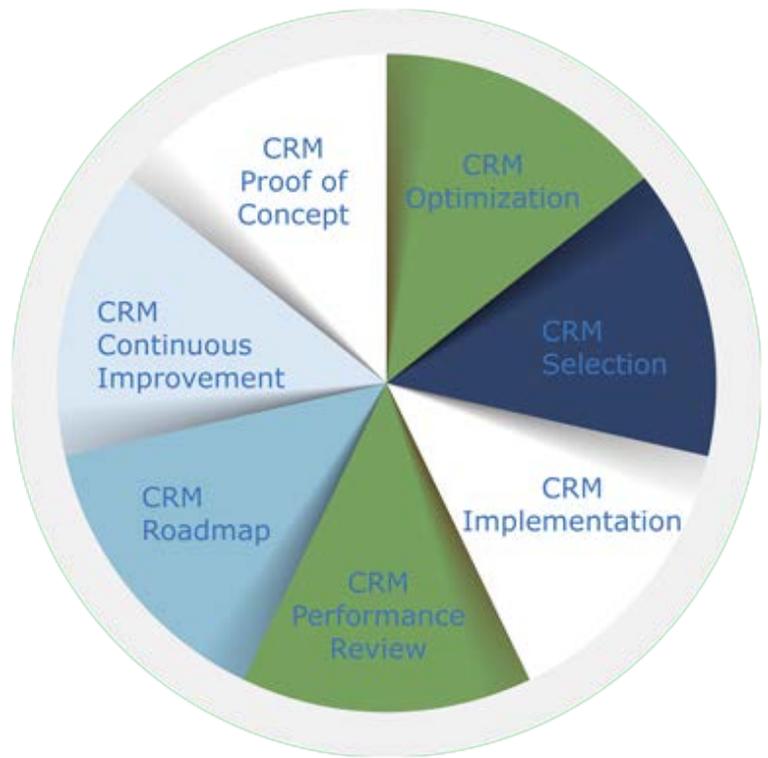
Today's leading CRM solutions are much more than a "digital rolodex on steroids". They not only manage customer relationships; but also drive better corporate and internal business unit interactions. Beyond managing leads, contacts, opportunities, and contracts, they are at the heart, the hub around which business operations run to achieve a previously unimaginable level of efficiency and excellence.

At Convoko, we understand business optimization and believe in implementing CRM in the most effective and efficient way. With a world-class implemented CRM, we can help you align your people, processes, and technology around your key strategic initiatives. We do this through seven standard CRM-centric service offerings designed to maximize your ROI and user adoption.

## We Deliver CRM Value

Our comprehensive yet streamlined approach begins with the customer, you, in mind. Our methodologies and recommendations ensure that your business operations are optimized and aligned to industry best practices. With Convoko, you will be able to:

- Maximize the value of your business applications and technology investments
- Integrate disparate processes to get unparalleled, end-to-end efficiency
- Get the information you need to make better decisions faster
- Business responsiveness and improve customer satisfaction
- Simplify, automate, and streamline your business operations



## Get More Out of Your CRM

If you implemented your CRM solution and you still ...

- Don't know how key accounts are performing
- Don't know which are really your top accounts
- Run your sales review on Excel
- Don't have clear pipeline visibility
- Can't tell if you will reach your sales goals
- Can't synch up info with sales and operations

**Then your business needs CPR.** With our complimentary, no-risk CPR (CRM Performance Review), we can help you identify the things in your CRM that are working well and the things that are not, so you can achieve your business goals and improve user adoption. Contact us today to learn more.



### Our Offices:

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## We can help your business

Convoko serves the diverse market of companies who need help optimizing their business operations and their CRM implementations. Contact us today to learn more about what we can do for you.

**855-426-6865**

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