Customer Relationship Management Optimization System

Phase 1: Problem Understanding & Industry Analysis — How to Work Through It

1. **Requirement Gathering:**
   Start by conducting interviews, workshops, or surveys with users and stakeholders across departments—sales, marketing, customer support, and IT. Ask questions to uncover challenges like lost leads, delayed responses, or lack of data visibility. Capture pain points clearly to understand what the system needs to solve.
2. **Stakeholder Analysis:**
   Identify who will be impacted by the CRM implementation and what their goals are. For example, sales managers might want better pipeline visibility; marketing needs to track campaign effectiveness; support teams require quick access to customer histories. Map out their priorities and expectations to align the solution accordingly.
3. **Business Process Mapping:**
   Document existing workflows such as how leads enter the system, how sales reps follow up, how cases are logged and resolved, and where bottlenecks occur. Visualize these processes with flowcharts or diagrams to get a clear picture of the current state and opportunities for improvement.
4. **Industry-specific Use Case Analysis:**
   Research CRM best practices relevant to the industry—in this case, technology hardware sales. Understand common sales cycles, customer expectations, and compliance requirements that should influence your CRM design.
5. **AppExchange Exploration:**
   Explore Salesforce AppExchange to find apps that can complement native Salesforce features. Look for solutions that improve lead nurturing, enable better email marketing integration, or provide advanced analytics to meet the identified business needs.

Use Case Example: TechGear Solutions (Technology Hardware Sales Company)

- **Requirement Gathering:**
  Interviews reveal that TechGear's sales reps often lose leads due to manual tracking. Marketing runs campaigns but lacks insight into which leads convert. Support teams struggle to see previous purchase history, leading to repeated customer questions.
- **Stakeholder Analysis:**
  Sales managers want real-time pipeline updates. Marketing leads require integration with email platforms to track engagement. Support heads seek faster case resolution with customer context. IT admins focus on data security and user access controls.
- **Business Process Mapping:**
  Documented that leads come from website forms and trade shows but are entered into

spreadsheets manually. Sales reps follow up inconsistently. Customer support logs cases in a separate system with no sales data linkage.

- **Industry-specific Use Case Analysis:**
  Learned that in technology hardware sales, lengthy sales cycles with multiple decision-makers are common, so CRM must support tracking multiple contacts and deal stages.
- **AppExchange Exploration:**
  Found an AppExchange app for automated lead assignment and email tracking, which can integrate with their existing marketing tools, improving lead nurturing and follow-up efficiency.