

CRM Implementation Plan

Enhancing Efficiency and Customer Relationships

FT Coker - Aug 2024



Introduction

The CRM implementation project aims to address key challenges and improve overall efficiency in customer relationship management. Primary objectives are:



Enhance Sales Tracking: Improve the accuracy and efficiency of sales tracking across all divisions.



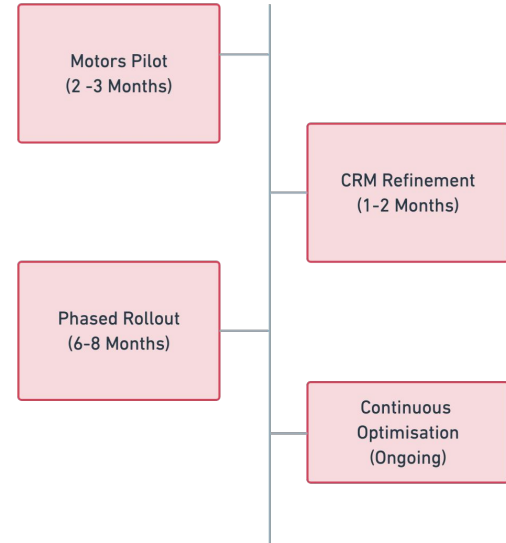
Streamline Customer Relationship Management: Develop a more united approach to managing customer interactions and relationships.



Increase Operational Efficiency: Optimise processes to reduce inefficiencies and improve overall productivity.



Phased Implementation: Provide a structured, phased approach that can be initially applied to the Motors division and subsequently expanded to other divisions.



Estimate 9 - 13 Months

Current Challenges



Operational Efficiency:

- Current processes require manual data entry across multiple systems
- Time-consuming task switching between different tools and platforms
- Limited visibility into overall workflow and bottlenecks



Sales Opportunity Management:

- Difficulty in tracking leads throughout the sales pipeline
- Follow-up processes are managed individually, which may result in missed opportunities.
- Limited ability to analyse conversion rates and sales cycle length



Customer Experience Enhancement:

- Fragmented customer data across different departments
- Inconsistent communication channels and response times
- Limited ability to provide personalised service based on customer history



External System Integration:

- Multiple standalone systems with limited interconnectivity
- Manual data transfer between systems increases risk of errors
- Challenges in generating comprehensive reports across departments

Limited Customer
View

Incomplete Lead-
Sales Conversion

Service Bookings
without Calendar

Unanticipated
Service Costs

Lack of Follow up
Data

Emails for Issue
Resolution

Inconsistent
Customer Experience

Phases of Implementation

Phase 1: Motors Division Pilot:

- **Description:** Initial implementation in the Motors division to test and refine the CRM system.
- **Actions:** Setting up the CRM, training staff, and collecting feedback.

Phase 2: Analyse and Refine:

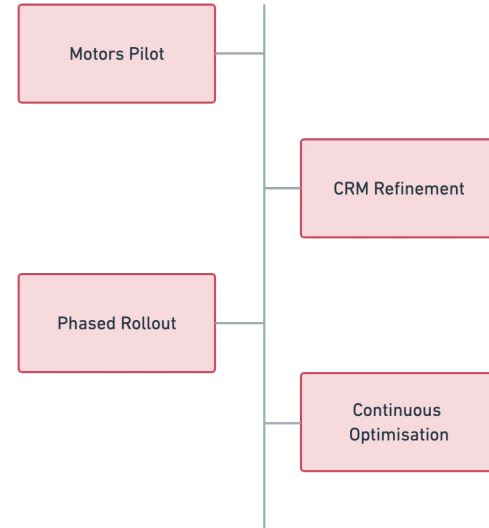
- **Description:** Evaluate the results from the pilot phase and make necessary adjustments.
- **Actions:** Analysing data, addressing issues, and optimising processes.

Phase 3: Full-Scale Implementation:

- **Description:** Roll out the CRM system across all divisions based on learnings from the pilot.
- **Actions:** Implementing the CRM, training staff, and ensuring system integration.

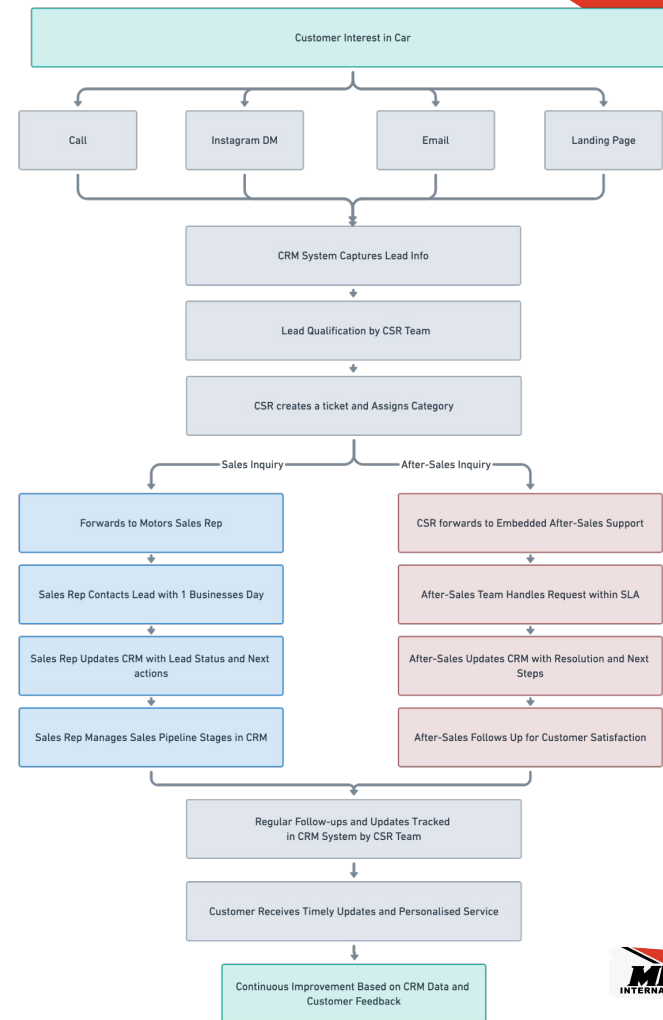
Phase 4: Post-Implementation Optimisation:

- **Description:** Continuous monitoring and improvement of the CRM system to ensure sustained benefits.
- **Actions:** Regular updates, user feedback collection, and process optimisation.



Visualising Success: Motors

- Initially the CRM capture will be manual. As the system improves automations can be added.
- CSR team performs lead qualification, assessing the nature and urgency of the inquiry.
- Based on this qualification, the CSR would then categorise the ticket as Sales or After-Sales.
- This process ensures proper routing and timely handling of all customer inquiries.
- Process continually improves based on CRM data insights and customer feedback, allowing for ongoing optimisation.



Key Outcomes



Increased Sales Conversion Rates:

- With our new CRM system, we aim to achieve a 5-8% sales conversion rate from lead to closed deal
- This conservative benchmark is lower than typical industry averages (10-15%) to account for the complexity of selling across multiple industries and the initial learning curve of using a new CRM system



Reduced Issue Resolution Time:

- The CRM will help reduce issue resolution time to 3-5 business days
- This target is more conservative than some industry standards (1-3 days) to account for potential challenges in routing tickets across different business units and the time needed for staff to adapt to the new CRM system



Enhanced Customer Satisfaction Scores (CSAT):

- We anticipate achieving a CSAT score of 60-70%
- This goal is set lower than many industry standards (75-85%) to acknowledge the challenges of implementing consistent customer service practices across diverse business sectors and the time required to fully leverage CRM insights for improved customer experiences

Project Team

- The modular design allows for easy expansion as the company grows.
- Vendor-provided training will save costs and ensure best practice CRM methodologies are used across the company.
- Sales Reps focus solely on sales tasks related to their specific divisions
- After-Sales reps are embedded in each division, ensuring specialised support and maintaining strong customer relationships post-sale.

