

CRM Implementation Plan

Enhancing Efficiency and Customer Relationships

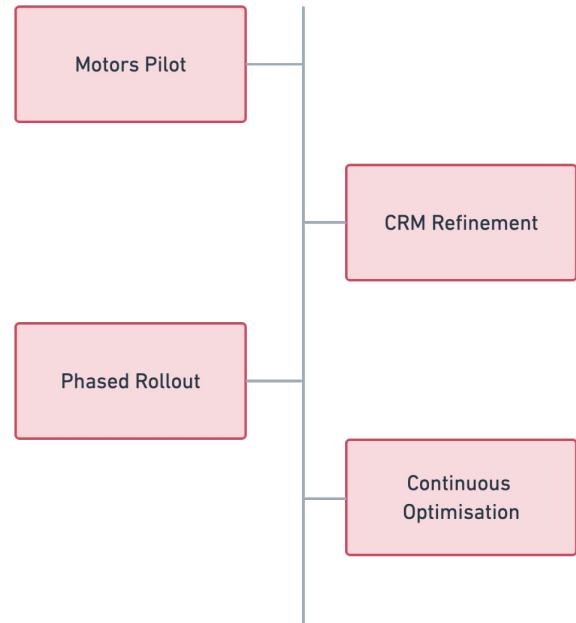
FT Coker - July 2024



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.



Current State vs Desired State

Current State:

- **Fragmented Processes:** Current workflows are disjointed, leading to inefficiencies and errors.
- **Manual Tracking:** Reliance on manual tracking methods results in inconsistent data and increased workload.
- **Departmental Silos:** Lack of integration between departments hampers communication and collaboration.

Desired State:

- **Integrated Processes:** Streamlined workflows with integrated systems for seamless operations.
- **Interaction Tracking:** Reliable and consistent data with automated tracking methods.
- **Unified Departments:** Improved communication and collaboration through integrated departmental processes.

Current State

VS

Desired State

- **Fragmented Processes:** Current workflows are disjointed, leading to inefficiencies and errors.
 - **Manual Tracking:** Reliance on manual tracking methods results in inconsistent data and increased workload.
 - **Departmental Silos:** Lack of integration between departments hampers communication and collaboration.
- **Integrated Processes:** Streamlined workflows with integrated systems for seamless operations.
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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
- Inconsistent follow-up processes 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



3 Key Challenges

Technical Challenges:

- **Challenge:** Overcoming technical hurdles in CRM implementation and ensuring seamless integration with existing systems.
- **Solution:** Develop a detailed data migration plan, including data cleaning and validation steps, to ensure accurate and seamless transfer of information. Conduct thorough testing and work with IT to address any compatibility issues.

Resistance to Change:

- **Challenge:** Employees may resist using the new CRM system due to unfamiliarity or fear of change.
- **Solution:** Provide comprehensive training and ongoing support to help employees become comfortable with the new system and understand its benefits. Encourage adoption and proper usage of the CRM system across all departments.

Balancing Ambition and Realism:

- **Challenge:** Setting realistic timelines and resource allocations while balancing ambitious goals with practical implementation steps.
- **Solution:** Ensure appropriate resource allocation for successful implementation and regularly review CRM metrics, conduct user surveys, and implement updates to enhance the system's effectiveness and user experience.

Phases of Implementation

Phase 1: Motors Division Pilot (Child Stage):

- **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 (Adolescent Stage):

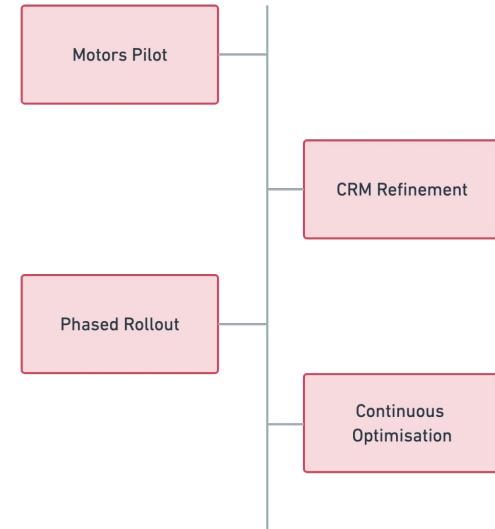
- **Description:** Evaluate the results from the pilot phase and make necessary adjustments.
- **Actions:** Analysing data, addressing issues, and optimising processes.

Phase 3: Full-Scale Implementation (Adult Stage):

- **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 (Parent Stage):

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



Visualising Success

Before

Customer sends DM via Instagram

Support staff manually entering details into a spreadsheet

Salesperson manually messaging customer and updating the spreadsheet

Support team struggling to find customers purchase history during a service visit.

After

Customer uses form to request information via Instagram

Customer inquiry automatically logged into CRM

Sales person receives notification and begins nurturing lead

Support team easily accessing customers history



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

Implementation Challenges and Solutions

Data Migration Challenges:

- **Challenge:** Moving existing data to the new CRM system can be complex and time-consuming.
- **Solution:** Develop a detailed data migration plan, including data cleaning and validation steps, to ensure accurate and seamless transfer of information.

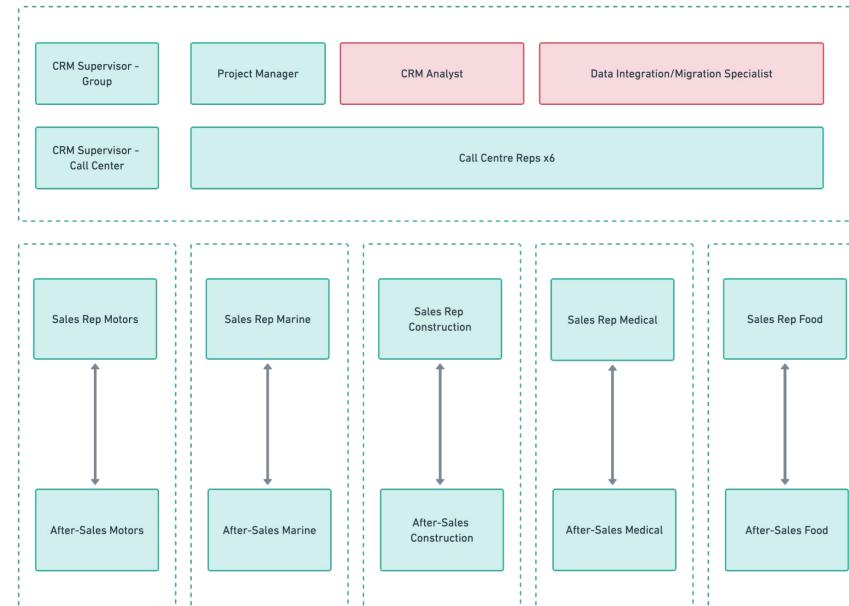
User Adoption Hurdles:

- **Challenge:** Employees may resist using the new CRM system due to unfamiliarity or fear of change.
- **Solution:** Provide comprehensive training and ongoing support to help employees become comfortable with the new system and understand its benefits.

Integration with Existing Systems:

- **Challenge:** Ensuring the new CRM integrates smoothly with existing tools and systems.
- **Solution:** Conduct thorough testing and work with IT to address any compatibility issues, ensuring seamless integration and data flow between systems.

Project Team



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.

Our Role in Customer Success

Guiding Implementation:

- **Description:** Our team will lead the implementation of the CRM system, ensuring that all departments are fully integrated and operational.
- **Role:** We will coordinate with each department, providing support and expertise to tailor the CRM system to meet specific needs.

Training and Support:

- **Description:** Comprehensive training programs and ongoing support will be provided to ensure all employees are comfortable and proficient with the new system.
- **Role:** We will conduct training sessions, create user guides, and offer continuous assistance to address any questions or issues.

Continuous Improvement:

- **Description:** Post-implementation, we will continuously monitor the system's performance and gather feedback to make necessary adjustments and improvements.
- **Role:** We will regularly review CRM metrics, conduct user surveys, and implement updates to enhance the system's effectiveness and user experience.

Call to Action

Recap of Benefits:

- **Increased Sales Conversion Rates:** Aim for a 5-8% conversion rate, enhancing sales performance.
- **Reduced Issue Resolution Time:** Targeting a 3-5 business day resolution, improving customer service efficiency.
- **Enhanced Customer Satisfaction Scores (CSAT):** Expected scores of 60-70%, leading to better customer experiences.

Next Steps for Kickoff and Implementation:

- **Detailed Implementation Plan:** Review and finalise the implementation phases.
- **Stakeholder Engagement:** Ensure all departments are informed and prepared for the transition.
- **Training Schedule:** Set up comprehensive training sessions for all users.

Request for Support and Engagement:

- **Management Support:** Encourage active participation and support from all levels of management.
- **Employee Engagement:** Motivate employees to engage with the training and provide feedback.
- **Continuous Improvement:** Emphasise the importance of ongoing feedback and improvement to maximise the CRM system's effectiveness.



Q&A