CRM rollout

Under-pinned by a robust database management system DevMan can handle large volumes of data, make your team's work easier and enhance their productivity.

To realise the promised benefits and achieve your CRM database goals it's important to make the transition to DevMan with a well thought out roll-out strategy. This guide which follows a tried and tested phased approach is designed to get you there as quickly as possible and with minimal disruption and productivity loss.

Step 1 - System set up and data imports

System value depends on acquisition of data from legacy systems. Steps include:

- DevMan team to provide Import Specification Document
- Client to source official CRM data
- DevMan team to import data
- Client to source any other data (mailing list spreadsheets etc)
- DevMan team to import data
- Client to verify imported data with assistance from the DevMan team

Step 2 – Basic training

A series of introductory sessions will be provided to cover the following:

- View and update contact profiles
- Search for contact groups (eg. by sector, by region)
- Build customised reports
- Produce customised exports
- Send individual and bulk email and SMS

Step 3 – Advanced training: communication & events

DevMan provides a complete set of tools for managing subscriptions, bulk mailing and events. Training will cover:
- Manage subscription and mailing lists
- Newsletter template design
- Send mailshots
- Event setup and management of the invitee list
- Send event invitations with online RSVP
- Track attendees and event reporting