

Integrated Sales Management, Inc.



“Helping You Grow!”

Customer Relationship Management

ISM Helps Our Clients:

- ◆ Establish CRM Priorities
- ◆ Link CRM Strategy to Results
- ◆ Implement CRM Technology

Integrated Sales Management helps our clients increase sales and profitability from customer relationships by identifying and enhancing the critical processes necessary to achieve revenue growth...

Then integrating the Technology and People required to execute their CRM Strategy.

CRM Strategy Assessment

Defining a winning CRM Strategy is the most important step in any CRM initiative and in many cases the most commonly overlooked. ISM focuses on providing our clients a systematic approach designed to clearly define the specific impact CRM will have on key areas within your business. CRM Strategy includes defining Measurable Business Results, Identifying and Improving Key Business Processes, Establishing Accountability for Key Roles, and Developing a Roadmap to achieve success.

This also includes outlining specific requirements for CRM Technology as well as major obstacles likely to cause CRM to fail.

CRM Strategy Execution

Successful CRM involves change and effective leadership. ISM focuses on equipping our clients with the tools and guidance necessary to successfully lead their organizations through the maze of change required to succeed.

This includes effective training that addresses both business process and technology, tools that allow visibility into business results, and executive coaching on how to use new CRM tools to grow revenue and profitability.

CRM Technology Implementation

With expertise in the leading Mid-Market CRM products, ISM focuses on providing solutions that fit and support our clients unique business processes. Our measure for successful CRM goes far beyond the installation of software and includes our client's ability to use technology to drive results from their business.

ISM has established Best Practices that include our 8-Steps for CRM Success leveraging both CRM Strategy Assessment and CRM Strategy Execution to help our clients achieve real business results.

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CRM Success Principles

- 1. Establish Executive Commitment**
 - ◆ Clearly set Corporate Priorities
 - ◆ Establish Roles and Accountability
- 2. Define Measurable Business Results**
 - ◆ Link CRM Strategy to Results
 - ◆ Define "How" CRM will Create Impact
- 3. Develop CRM Success Roadmap**
 - ◆ Select Tools that Support CRM Strategy
 - ◆ Show how Strategy Creates Results
 - ◆ Define Overall CRM Investment

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Why CRM Fails

A chronic problem faced by companies implementing CRM is that **nearly 70% of these implementations fail**. There are three common reasons organizations fail to achieve tangible results that impact sales and drive customer growth. These include:

1. Lack of Executive Commitment

This means someone with the authority and willingness to lead the initiative and make difficult choices. Because CRM primarily includes **Business Process changes** enhanced by Technology, this sponsor must have the authority and capacity to make decisions that require change. **Strong Executive leadership** is the single-most effective way to see significant gains in a CRM Strategy. CRM offers many opportunities to increase sales but the Executive Sponsor is responsible for ultimately defining these priorities. This leader should also work to create a framework that focuses the company on these priorities by using tools to support critical business strategy. This means making small but deliberate changes over time to tie these strategies in more effectively.

2. Focusing on CRM Technology Rather than Business Results

A common theme mentioned in the circles of CRM is that to successfully develop CRM you must focus on **People, Process, and Technology**. As true and obvious as this may seem, many companies still operate as if selecting the right technology product will bring them CRM success. This is compounded by the idea that as technology improves that CRM failures will diminish. Real world examples don't show this to be true.

What ultimately makes CRM successful, after a strong leader, is a fully developed and clear understanding of the specific business obstacles that currently limit growth. Once the hurdles that dampen growth have been clearly identified, better processes enabled by newer technology make it possible to overcome these obstacles and realize real gain.

3. No Road Map to Achieve Business Results

Failure to Plan has been said to be the same as Planning to Fail. Maybe a bit cliché but certainly true for CRM. Why? Because successful CRM occurs when **clearly defined strategy is supported by the right Technology**. Unfortunately, many companies move forward with CRM technology without a clearly defined plan to produce results. Therefore, organizations that successfully implement CRM solutions focus on creating specific results tied to a simple plan based on a well thought out strategy.

These reasons for failure have lead many to believe that CRM is simply a gimmick designed to sell more software. While there is some truth to this, what has really happened is companies are beginning to realize that CRM is not a one-time software purchase but an evolving strategy that must become integrated within the fabric of your organization.

A Better Way!

ISM helps clients navigate the rough waters of implementing powerful CRM solutions. Our methodology and expertise is focused on providing our clients with the clarity of purpose and Best Practices to successfully leverage CRM Strategy and Technology to see real business results.