

CRM Value Assessment and Roadmap

Why Customertimes

Customertimes has more than 15 years of experience delivering CRM solutions across multiple industries. No matter what stage your project is in, our value assessment services will help you maximize business ROI.

CRM Value Assessment

Is it time to derive greater business value from your CRM projects? The CRM Value Assessment is designed to help organizations assess their current state, identify future goals, and develop a roadmap to achieve business objectives.

Key Activities

- Establish a baseline understanding of the digital maturity of your organization
- Identify pain points and develop a plan for resolution

Deliverables

- A prioritized gap assessment of best practices aligned with process areas
- An ideal future state high-level architecture with a recommended plan of action

The CRM Value Assessment and Roadmap

Customertimes offers practical business solutions to real-world problems, and each time we work with a client, we look for ways to help them gain momentum and achieve ongoing results. In our experience, CRM projects frequently fail to meet expectations, largely due to internal misalignment on business value, technology integrations, and change management.

We've noticed that companies often view go-live as being closer to the end of their journey rather than the beginning, an approach that inherently limits the value organizations can derive from their CRM projects.

To combat this, Customertimes recommends the use of a CRM Value Assessment.

What the CRM Value Assessment Provides

The CRM Value Assessment provides a thorough review of the current state of business operations along with a roadmap designed to align the timing, vision, value, and cost of each project with the desired future state. It includes:

- A clear understanding of the digital maturity of your business operations, which can then be used as input into your strategic planning.
- A prioritized gap assessment against best practices aligned with key process areas.

//

Like most companies who have implemented Salesforce, we knew we could have optimized the value we could gain from this powerful platform better and would benefit from working with a company who could assess our usage and recommend practical best practices that were business benefit-focused. Customertimes certainly delivered in all aspects of Salesforce optimization.

//

Eli Cohen

Senior Marketing and Communications Director
Cambrex

The Customertimes Approach

Customertimes recommends a three-step approach to your Value Assessment and Future Roadmap:

1 Assess Current State

- Conduct interviews with key business leaders and IT stakeholders
- Capture landscape and integration flow
- Determine findings
- Document Assessment

2 Identify Future State

- Define gaps and opportunities
- Define opportunity alternatives and recommendations
- Define future state high-level technical architecture

3 Define Roadmap

- Prioritize opportunities
- Define "Quick Wins"
- Develop high-level costs and resource requirements
- Define next steps

Top Recommendations Output

Area of Focus	Finding	Opportunity	Frequency	Level of Effort	Business Impact	Change Management Impact
Process Area 1	Finding 1	Opportunity 1	High	Low	High	Medium
Process Area 2	Finding 2	Opportunity 2	High	Low	High	Medium
Process Area 3	Finding 3	Opportunity 3	High	Low	High	Low
Process Area 4	Finding 4	Opportunity 4	High	Med High	High	Medium
Process Area 5	Finding 5	Opportunity 5	High	Med	High	Medium



Where Are You Now?

Assess your current state



Where Do You Want to Be?

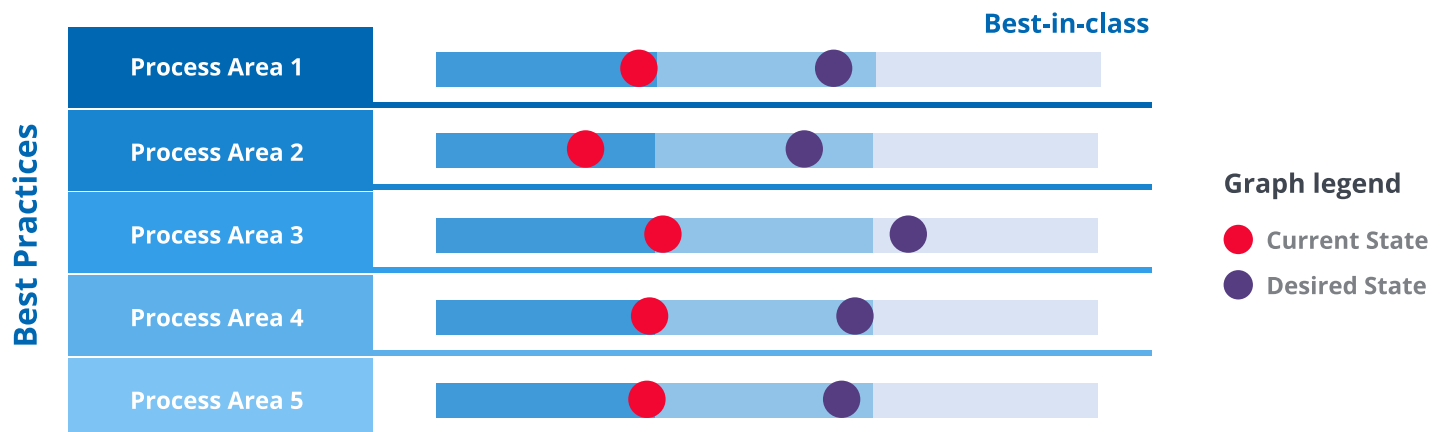
Identify your goals



How Will You Get There?

Plan your roadmap

Current Salesforce Assessment vs. Best in Class



Why Customertimes

These characteristics are the basis of our approach and the reason our customers choose to work with us.



Business value oriented with a wide range of industry expertise



Technical competency with core CRM and peripheral solutions



Real-world experience with 4000+ projects completed

To learn more or schedule your own CRM Value Assessment, please contact us today — experts@customertimes.com.