ROADMAP

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DRIVING MEANINGFUL CHANGE

Why Do You Need a CRM?

Land Acknowledgement

In the spirit of Truth and Reconciliation I'd like to take a moment to acknowledge that this webinar while virtual, I am joining you in Edmonton from Treaty 6 territory. This place is a traditional homeland for the First Nations and Métis Peoples, and today some of you, myself, colleges and clients are part of this treaty land where we work, learn and thrive together.

Meet Your Presenter

Steve Whittington
President, Roadmap Agency

Steve Whittington is a professional speaker, entrepreneur, author, and father of three - passionate about technology and enabling other entrepreneurs for sustainable growth.

With over 25 years of executive experience, extensive board work across retail, manufacturing, startups, and agriculture sectors, Steve brings a broad base of business experience to helping organizations transform their end to end customer experience.

Connect with Steve on LinkedIn to learn more.

Topics

What is a CRM

The Promise of CRM

Concepts:
- Point solution versus platform
- Composable systems
- Your tech stack

Creating Value With your Platform

Use Cases

Missteps and How to Avoid Them

A Mountain With No Top

About Roadmap

What is a CRM?

CRM stands for **"Customer Relationship Management"**. By traditional definition, a CRM software system helps organizations to track client and lead communications as well as nurture client relationships.

A modern CRM extends this definition and serves as a platform to connect all the data from your prospects, subscribers, leads and customers into one place - making your CRM platform the single source of truth about your customer.

The Modern CRM

The modern CRM consolidates your client communications from all channels (website, SMS, VOIP, emails, meeting bookings, promotion form fills, & social media) into a single, convenient location. In addition, client information like documents, quotes, purchases, and tasks associated with each lead and client are linked to their profile, making essential information readily available. This means that your entire team can access those details at the right time – to close a sale or deliver outstanding service.

Further, a CRM can automate processes and trigger reminders, ensuring that tasks are completed and the designed processes for your customers are executed with consistency.

Last, but certainly not least. All activities can be reported on creating a predictable revenue model for your organization.

The Promise of a CRM

- Increased Sales

- Automation - Save Time & Provide Consistency

- Reports & Dashboard

- Single Source of Truth

- Visibility

The Real Value of a CRM

Consolidation: A CRM replaces the multitude of spreadsheets, databases and apps that many businesses patch together to track client data.

Transparency

Insights

Predictability

Custom Real time Reporting

Behavioral insights

Scalability

Standardization

Efficiency

Quality Control

Point Solution Versus Platform

Point Solution
A point solution is any tool or software that aims to address a single use case or challenge that exists within a business.
Examples - SMS (Short Messaging Service)

SurveyMonkey®

mailchimp

Platform
A platform enables businesses to create solutions that address a variety of use cases across their operations. They're tools for improving connectivity, control, and data collection.
Examples - ERP (Enterprise Resource Planning Software)

HubSpot

Microsoft 365

The primary difference between an operations platform and a point solution lies with both scalability and flexibility. While point solutions are designed to tackle a single, specific problem, platform solutions offer a robust foundation that can address a number of use cases and can be rolled out across multiple facilities very quickly. With a primarily "no code" platform like HubSpot there is flexibility that could normally only be obtained with custom solutions.

Composable Systems

Composable Systems: **With a primarily "no code" platform like HubSpot there is flexibility that would normally only be obtained with custom solutions.**

By modifying pre-built templates—implementers can get started with digital transformation fast.
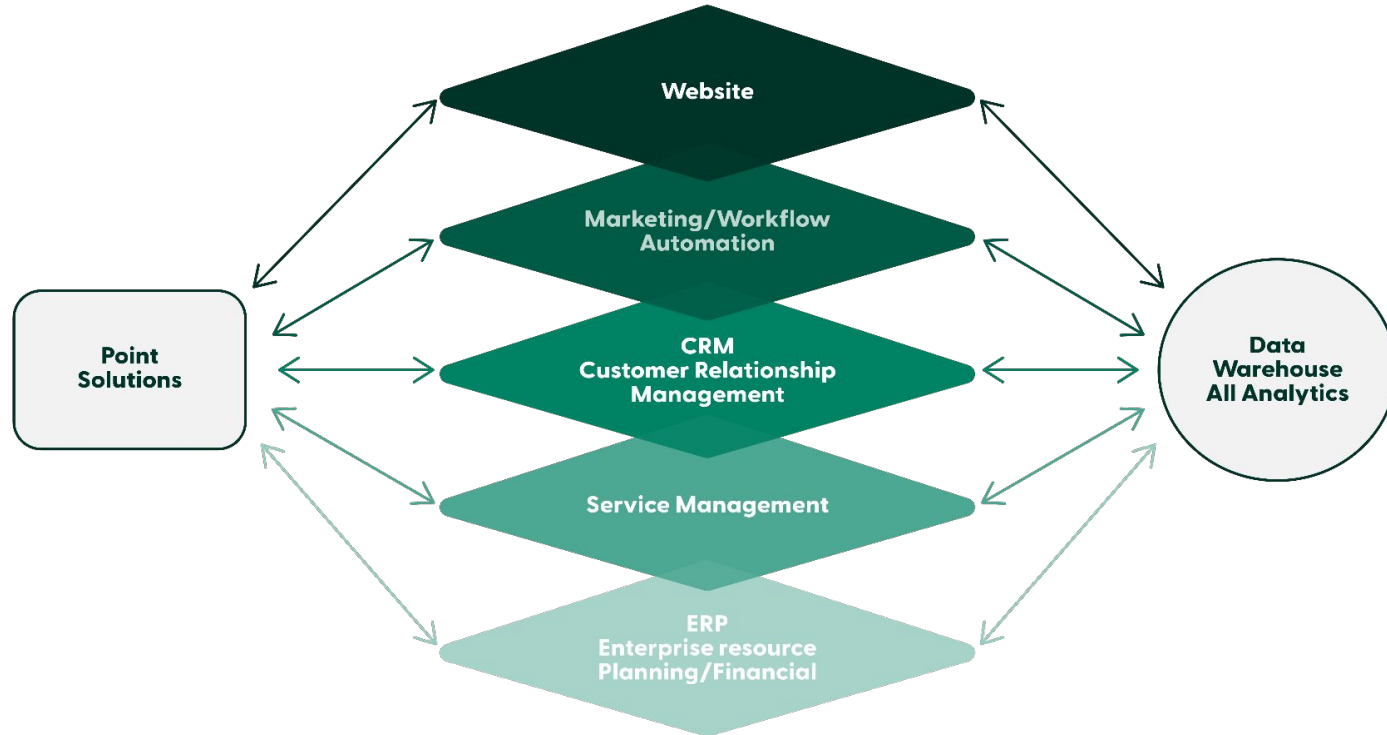
Implementers can add use-cases and scale as the situation calls for it with addons (third party Integrations) that have built in connectors (API's Application Programing Interfaces) that allow transfer of data between point solutions and a platform

Tech Stack

A technology stack, or tech stack, is the collection of tools, platforms, apps, and pieces of software that a company uses to build its products, carry out its business operations, and monitor its performance metrics.

Ideally your tech stack is integrated and optimized to support your business processes.

Modern Tech Stack

Website

Marketing/Workflow Automation

CRM
Customer Relationship Management

Service Management

ERP
Enterprise resource Planning/Financial

Point Solutions

Data Warehouse All Analytics

Creating Value With Your Platform

01

First, know your processes or know that you need help mapping them.

02

Second, know all the independent tools your teams or functions use: Marketing Websites; Sales; Service.

03

Third, think of the goals you are trying to reach. A system that can provide metrics that matter can report on goal progress

Use Cases

An Education Company that connects their live course offerings in an e-commerce platform with a CRM that automates the creation of google classroom and student notifications

A consulting company that wins deals with specific skill sets by knowing availability and skill matching of their 100 + consultants

A fin tech organization that monitors the onboarding of new customers and usage of their products and creates custom "nudges" of support from their team to increase adaptation and provide support

A b2a company that needs to manage events inquiries and has multiple sources of leads, and a multifunctional sales team. They need a predictable forecast for future revenues, staffing capacity, and future availability targeting.

Common Missteps

· Lack of a coherent CRM strategy

· Lack of attention to process

· Focusing on technology, rather than people

· Failure to adopt, once implemented, often caused by:

     · Lack of executive commitment

     · Poor data quality

     · Lack of alignment with the existing IT architecture

A Mountain With No Top

An effective CRM program is a culture of continuous improvement. The CRM implementation gives you the baseline from which to grow, there are always ways you can improve the performance of your CRM system, as you work in it and grow your customer communications abilities.

Demo

Strategic Marketing Driven by Technology

Roadmap is a marketing agency and consultancy that helps small to medium sized businesses grow.

Capabilities

Roadmap provides a customizable range of product and service solutions. Designed for businesses like yours to ensure measured and optimized outcomes.

Consulting and Education

Strategy

Market Research

Technology and Platform Implementation

Brand

Capabilities

Customer Experience

Marketing Plans

Web Design and Development

Content Creation and Execution

Inbound Digital Marketing Services

Process

Every business is unique. It has its own strengths, weaknesses, challenges, and opportunities. To define success, and a plan to get there, you'll need a partner that understands this identity. No matter what services you may need, understanding you, your goals, and your business is the foundation for our Roadmap.

Thank you.

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Questions