

# CRM/SFA Implementation Practice

Riverdale  
Partners

Customer Relationship Management (CRM) systems help automate and systematize your relationships with customers, clients, citizens – any external group that is critical to your organization's success. Successful CRM implementations begin by carefully defining your objectives for each of these relationships – objectives that can range from increased sales, to referrals and testimonials, to awareness, education and empowerment.

When your objectives include increasing sales and profits using a direct sales force, CRM systems are the ideal platforms for Sales Force Automation (SFA). As with any CRM implementation, successful sales force automation begins with the clear definition of your objectives, a careful assessment of the needs and concerns of your sales organization, and an implementation plan that builds on a understanding of what really works.

## Business Process Review/Sales Audit

Riverdale views the business process review stage as an essential first step to any successful implementation. This process helps identify breakpoints in your marketing and sales process, measuring gaps or weaknesses in your sales team's skills, and specifying corrective action. This stage entails:

- a review of any potential CRM/SFA implementation.
- a review of all currently identified processes, procedures and list of key organizational goals to understand how to modify your chosen system platform. .
- Understanding the requirements concerning data within the organization to develop an appropriate workflow/sharing/security model that ensures proper protocols and efficient user requirements are met.

### **Key Implementation Stages**

Business Process & Sales Audit  
Process Mapping  
CRM/SFA Configuration  
Data Preparation  
Data Loading  
Pilot Testing  
Training  
Post Implementation Support

## CRM/SFA Platforms

CRM/SFA is a core area of practice that is often an overlooked component of the sales, marketing and customer service process. Properly implemented, a CRM system helps drive the right activities and measure key outcomes that drive business growth. Our implementations in this area have ranged from developing simple desktop applications for sales pipeline tracking, to more powerful enterprise-wide applications on leading CRM platforms.

Riverdale consultants specialize in imparting best practices related to workflow and collaboration on key information that can be delivered to your sales and customer service representatives in an integrated fashion – such as standardized corporate marketing documents and sales contracts. And our proprietary Contextual Customer Conversations™ (C3) framework can also be input into custom fields within your CRM system to ensure salespeople are following a systematic process. We also can provide assistance in integrating external data such as Hoovers™ and OneSource™ to make telesales operations run more efficiently. Customer support information can also be accessed to more effectively empower salespeople prior to or during client contact.

We also work with senior management in your client organization to identify and track the most meaningful marketing, sales and service metrics that drive the business. Then we create custom real-time reports, dashboards and alerts that give you one button access to the numbers you need to better forecast and deliver on your targets. And best of all, we build them into your existing systems such as Salesforce.com, SalesLogix™, Microsoft Dynamics™ or Interaction™ so they can leverage the investment you've already made. Clients tell us that making this investment not only enables improved management of their business on a daily basis, it also enables senior management to better communicate marketing and sales progress to investors, the Board of Directors, partners and other stakeholders.

## Post-Sales Customer Dialog & Support

What often goes overlooked, especially in early-stage companies is the value of customer satisfaction and its impact on customer retention. While standard case management and customer support applications within many CRM systems provide much of the functionality necessary for gathering and sharing key client information, much of this information is not properly tracked or reported to the right people across the organization.

We start with a detailed needs analysis and overlay this against a set of best-practices that works for your particular business. We then create a bi-directional communications system that allows for timely identification of individual and broader customer needs. For instance the type and frequency of help desk calls can be used to pinpoint recurrent product issues. Poor utilization rates or high usage can be used to cross-sell/up-sell or optimize a customer to retain and grow clients. Customer research programs such as online surveys conducted via email can also be integrated to automatically feed customer data directly into the system – saving valuable time and money in data collection and reporting. And of course, integration of this data helps measure the true costs of acquiring and servicing customers and channel partners.

Our CRM consultants work with your support staff and management to help identify important customer support information that needs to be centralized, as well as the operational metrics that are best captured within the system. This information is essential to better marketing, sales and product development.

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### CRM/SFA Practice Director

Jeff Hemming

Jeff Hemming specializes in developing integrated solutions that deliver information to senior management, sales, marketing and customer service teams to better address customer needs and generate profitable sales revenues. He has spent the past eight years implementing customer information solutions for organizations such as the Canadian Broadcasting Corporation, New Brunswick Telephone, FloNetwork, DoubleClick, and McCarthy Tétraut LLP. Jeff is experienced in implementing complete CRM solutions including needs analysis, information architecture, platform selection, systems development and user training. He has implemented a full range of customer relationship management applications including SalesLogix™, SalesForce.com™, GoldMine™, InterAction™ and Pivotal™. He has also created custom solutions on the Microsoft Windows Platform. Jeff holds a BA degree from the University of Western Ontario and is also a graduate of the certificate program in Direct Marketing from the University of Toronto.