



## Is your company is ready for CRM

### Corporate

1. Does your company have separate accounting, sales, marketing and customer support databases? **Yes**  **No**
2. Do many people in your company use paper-based calendars/day timers or stand alone calendaring tools like Outlook? **Yes**  **No**
3. Does your company have limited ability to track e-mails sent to prospects/customers etc? **Yes**  **No**
4. Does your organization have a high percentage of sales and general administrative expense? **Yes**  **No**
5. Is there a feeling that no one really knows what anyone else is doing, or where the team is in sales, and quota? **Yes**  **No**
6. If the company has a database are there issues with users not capturing the appropriate information? **Yes**  **No**

### Sales

1. Are forecasts done on paper/Excel Friday afternoons so that the manager can compile them manually? **Yes**  **No**
2. Do managers or sales operations have to compile all the Excel spreadsheets to create a report, which is only a snapshot of the past weeks activities, not the current picture? **Yes**  **No**
3. Do remote sales people have their own databases that their manager or other team members cannot see? **Yes**  **No**
4. When salespeople leave or are terminated do they take their entire set of prospects, leads, and referrals with them so that new sales people have no information and have to start from the beginning? **Yes**  **No**
5. Does your sales team have any access to vital accounting data like accounts receivable, credit limits, balances? **Yes**  **No**
6. If they don't, do they have to contact your accounting finance department in order to access this information? **Yes**  **No**  How long does this take? \_\_\_\_\_
7. Does your organization have a sales process that your sales teams are supposed to follow but you have no way to enforce it? **Yes**  **No**
8. Does your sales management team have issues with proactively managing your sales pipeline and producing timely and accurate, forecasts? **Yes**  **No**
9. Do managers have sales reps completing call reports on paper, taking them out of the field? **Yes**  **No**
10. Are a large percentage of sales brought in late in the quarter and many at a significant discount? **Yes**  **No**
11. Does management spend substantial amounts of time fighting "fires" and little time mentoring, training and coaching their teams? **Yes**  **No**



## Marketing

1. Are there issues with branding/consistent messaging occurring because everyone has their own style of writing company letters, with their own letterhead and signature files? **Yes**  **No**
2. Are mailings done through the accounting database and most of that costly marketing material is being sent to, and thrown away by, purchasing agents and accounts receivable people? **Yes**  **No**
3. Does marketing have problems segmenting or targeting their prospects effectively? **Yes**  **No**
4. Does marketing have issues with accurately measuring ROI on their programs? **Yes**  **No**
5. Does it take several days or even weeks for trade show leads get into the system? **Yes**  **No**
6. Are there concerns that those costly leads are adequately followed up and marketed? **Yes**  **No**
7. Are visitors on the company web site quickly responded to or followed up on? **Yes**  **No**

## Service/Support

1. Do customer service reps have any idea how much business the client does when they take their calls? **Yes**  **No**
2. Are customer issues and complaints getting resolved adequately and in a rapid timeline? **Yes**  **No**
3. Are complaining and angry customer the ones that escalates issues to senior management? **Yes**  **No**
4. Do clients often complain about poor levels of service/attentiveness? **Yes**  **No**

## Executive Management

1. Does management spend inordinate amounts of time try to get reports on the status of the business? **Yes**  **No**
2. Are poor decisions made based on old or inadequate data? **Yes**  **No**
3. Does your management team know who your best customers are? **Yes**  **No**
4. Does the company have little or no insight to the current status of business? **Yes**  **No**
5. Is information "hoarded" and kept secret by different departments in the organization? **Yes**  **No**