

CRM Strategy Worksheet

A customer relationship management (CRM) strategy is a company's plan to use CRM software to help grow sales and improve customer service. Use this worksheet to help guide your decision-making process from the initial planning stages to the purchase of a new CRM.

Step One: Review Your Overall Business Strategy

What are our top business goals?

1. _____
2. _____
3. _____

What is our unique selling proposition?

What is our value proposition?

What are our customers' buyer personas?

1. _____
2. _____
3. _____

What is our competitor landscape?

Step Two: Map the Customer Journey

What are our customer touchpoints (website, ads, social media, etc.?)

What challenges do our customers face?

What content and assets do we need to support the customer journey?

Step Three: Establish Sales Channels & Sales Process

What are our primary sales channels?

- 1. _____
- 2. _____
- 3. _____

What is our sales process?

Step Four: Understand Organizational Dynamics

What is our company's past experience with CRM software?

Who will use the CRM?

Departments and teams:

- 1. _____
- 2. _____

3. _____

CRM administrator:

CRM strategist:

Our alignment plan for Sales, Marketing, and Service:

Step Five: Define Team Goals

<p>S</p> <p><u>Specific</u></p> <ul style="list-style-type: none">- State what you'll do- Use action words	<p>M</p> <p><u>Measurable</u></p> <ul style="list-style-type: none">- Provide a way to evaluate- Use metrics or data targets	<p>A</p> <p><u>Achievable</u></p> <ul style="list-style-type: none">- Within your scope- Possible to accomplish, attainable	<p>R</p> <p><u>Relevant</u></p> <ul style="list-style-type: none">- Makes sense within your job function- Improves the business in some way	<p>T</p> <p><u>Time-bound</u></p> <ul style="list-style-type: none">- State when you'll get it done- Be specific on date or timeframe
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What are our team's performance-tracking SMART goals?

1. _____



2. _____

3. _____

What are our team's Key Performance Indicators (KPIs)?

1. _____

2. _____

3. _____

Step Six: Define the CRM Components

How do we define a **lead**?

How do we define a **prospect**?

How do we define an **opportunity**?

What **pipelines** do we need?

What **deal stages** do we need?

Step Seven: Selecting the Right CRM Software

What software requirements do we have?

CRMs to trial:

- 1.

- 2.

- 3.
