

# ROADMAP TO CRM SUCCESS

CRMs need a few things to meet your goals. Pay attention to each stop on the road and ensure your success!

## ORGANIZE CONTACTS

**Assign** to reps  
**Categorize**

Add emails, address, etc.  
Add industry specific info  
Add marketing info

## ADD NOTES & DOCUMENTS

**Meetings**, calls, etc.  
Proposals, **Contracts**, etc.

## CREATE EMAIL TEMPLATES

For **follow up** after 1st call...  
after sale/order, existing client  
check in, etc.  
For new potential **prospects**  
For **New clients**

## CREATE DASHBOARDS

For **sales reps** to self manage  
For **marketing** to track leads by  
source, campaign, etc.  
For **management** - track pipeline  
of future business, track ROI on  
marketing

## LOAD CONTACTS

From **Accounting**  
From Sales  
From **Marketing**

## SCHEDULE TASKS

Follow up **Calls**  
**Tasks**  
**Meetings**

## ADD MARKETING COLLATERAL

**Brochures**  
**Applications**  
**Specifications**  
**Pricing**

## ADD SALES

Future **Opportunities**  
Past Sales **History**

## AGREE ON STANDARDS

What is the **minimum** that must  
be **documented** in the CRM?

