



CRM DIAGNOSTIC TOOL

How to improve
your CRM?

+44 20 8895 6318

WWW.SINERASALESLAB.CO.UK

INFO@SINERASALESLAB.CO.UK

CRM as a strategical leverage

CRM is an indispensable tool for sales success. It is the neural network and command centre of all sales-related activities and organisations. But it is only as good as the intersection of platform capabilities, structural design, and implementation quality.

This fact brings us to this question: Are we getting the maximum return from our CRM investment as a company? Are we utilising all our CRM platform's possible technical and functional capabilities? What can be done to upgrade our CRM's potential leverage as a better design?

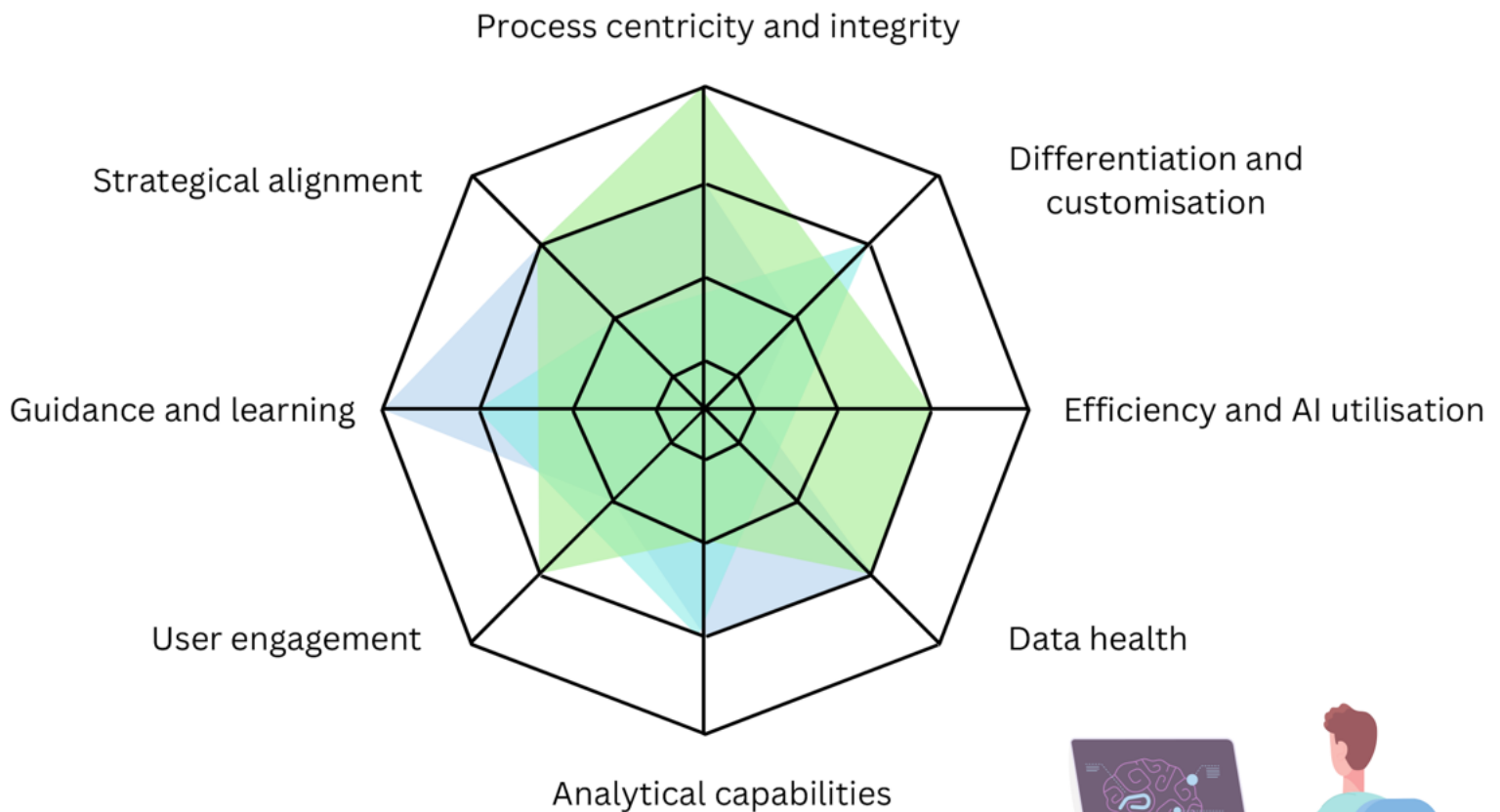
You need to master three faculties to answer these questions: Your CRM platform's all-over capabilities, the notion of a perfect CRM as a strategical leverage and your organisation's unique position related to these two.

Salesforce as a platform and Sales Cloud in particular offer the best-in-class possibilities for your cloud-based business and CRM needs. But how can you be sure it is optimally designed and perfectly customised only for your needs?



Sinera Sales Lab’s CRM Diagnostic Tool comes to your help to ensure that you are getting the most out of your CRM investment. We scrutinise your current running CRM from 8 critical perspectives to check if your CRM is optimal or not. If any improvements are needed, we will map out how things will be revised to upscale your CRM into another level of potential for sustainable sales growth.

Let’s have a look at these 8 perspectives that we use in our CRM Diagnostic Tool:





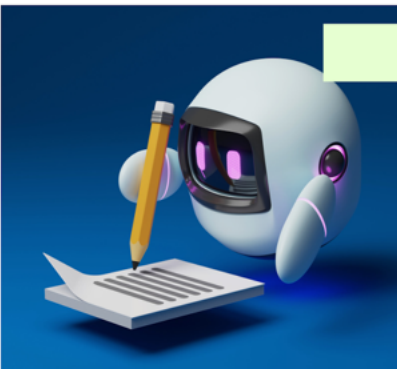
PROCESS CENTRICITY AND INTEGRITY

The sales process is the cement of all functionalities in CRM. It is the backbone of an up-and-running sales org. Any customer data, actions taken, and decisions made should be bound to the appropriate stage in the sales process. Otherwise, every functionality would be floating in space without getting connected to bigger business goals like sales efficiency or strategy and operations alignment. This means independent data silos will appear without no collective use.



DIFFERENTIATION AND CUSTOMISATION

This is one of the core pillars of a strategically leveraged CRM. Grabbing a comparative advantage with look-alike, feel-alike, function-alike CRM design is impossible. Customisation is the norm down to the bone. Follow the logic: Even the closest competition has a different market position, value proposition and processes. So, your CRM should not be different. Salesforce supplies a perfect fabric to be measured and tailored for your exact needs.



EFFICIENCY AND AI UTILISATION

The utilisation of automation capabilities brings enormous efficiency not just to CRM users but to the whole sales organisation. The rules, procedures, standards, notifications and controlling measures can all run in the background without noticing it. The efficient wins, not the strongest. AI is here not just to help with automation or raise flags for a possible churn but to generate valuable content for salespeople in responding to emails and handling hidden objections. Remember, effective content creation is the invisible bottleneck for better customer engagement.



DATA HEALTH

We are living in a data era, and it has become one of the biggest assets. To ensure your data's privacy and security, the right measures, policies, and tools should be used. CRM should lead the way to raise collective data consciousness among your users. Data privacy and security policies denote the quality of your managerial governance.

Data is king only if it can be captured timely and correctly. If you try to enforce data completeness by increasing the number of required data fields, you may end up blocking the progress of the process or meaningless data. We have a unique approach by segmenting all data fields, attributing them to different weights, measuring and reporting them, and helping you build cases for data completeness learning curve.



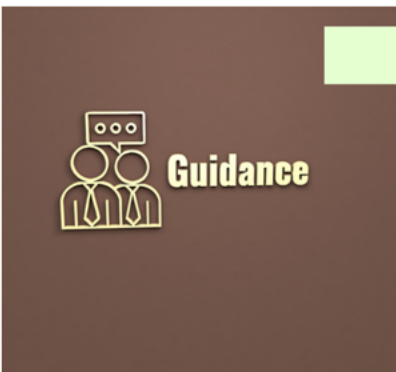
ANALYTICAL CAPABILITIES

Data is the footprint of all sales-related actions, but it is useless without analytical muscles deployed. Having several reports and dashboards at hand does not guarantee that you have proper analytical capabilities. It is like trying to light a dark room with a few torches. The journey starts with capturing the right kind of data. Metrics and KPIs are endless, but some have enormous analytical insight compared to others. By the time, you need to change some of the spots that you shed light upon. Another critical issue is how you mirror the absolute truth to your users. Most users will perform better by just seeing themselves among others by numbers.



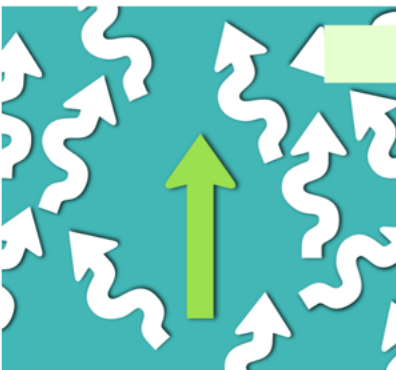
USER ENGAGEMENT

Engagement is the biggest threshold to step over. Low engagement means you are stuck on your first step in reaching your CRM goals. We believe user engagement is best solved by design. Users should benefit from CRM in their early days. We design and integrate sales performance projection and opportunity qualification tools, requesting their feedback on various sales issues, all on the CRM platform.



GUIDANCE AND LEARNING

Sales processes tell salespeople what to do but not how to do it. To cover this execution capability gap, you must serve the required guidance content whenever and wherever sales users need it. If they cannot get an answer to their meeting request, what are other methods and messages to reach out? How can they outperform the competition when troubled with lower prices? How can they turn needs analysis data into a killer presentation? We are very good at integrating sales playbook content into your CRM for better sales performance.



STRATEGICAL ALIGNMENT

CRM should reflect your sales strategy and align sales operations with it. Simply put, sales strategy is to choose or prioritise some customers, channels, actions, products over other options. We accomplish this with customer segmentation, portfolio planning modules, lead and opportunity qualification and scoring tools, and ideal customer profiles. We design and integrate the necessary tools for sales users to check if they spend their time on the right opportunities.



Another aspect of strategic alignment of a CRM platform is the managerial modules and tools to help sales managers check, control and support their sales team. CRM structures mostly lack the management tools which work on the platform. CRM is not just a tool for salespeople but also facilitates management impact on the team, which is still the biggest human leverage on a sales team's success.



Call us to check if your CRM serves your business goals and how you can leverage it as a strategic advantage

