



LogiCRM

Unlock your Customer Potential

Health Check

**Is your CRM in good health and is it driving real value for your organisation?
Discover your true customer potential with the LogiCRM Health Check.**

If you are looking to grow the business significantly, to achieve real increases in clients and revenue, particularly without significantly increasing staff numbers, technology is crucial.

Not just any technology but something fit for (your) purpose. Margins can be increased while keeping costs down and maintaining current staff levels. The system needs to join up all parts of the company, be easy to use and make new business acquisition from new and existing clients more seamless.

How long has it been since you rolled out your CRM system? Has it met your expectations, is it making your sales, new business and client servicing more efficient? Has it improved your team working and internal communication? Is it being used?

If it has that's great, however if it's starting to gather dust, if some groups are not using it, and if it's not doing what you expected then it's time to reinvigorate your business with a LogiCRM Health Check.

The Health Check will provide the following output:

- **Objectives:** Restatement of your original objectives, i.e. what you expect to achieve now and in the future. Where do you want to be in 5 years' time?
- **Current Status:** Where you are now, what you have achieved, what you haven't and why not.
- **Benefits:** What the achievement of your objectives will do to the wellbeing and bottom line of the company – both in financial and non-financial terms.
- **Project Success Factors and ROI:** How will you judge success? To determine what you will be able to do (but can't now) six months after completion then convert them into realistic returns.
- **Recommendations:** A set of key best practice actions which, if followed, will bring the project back on track.

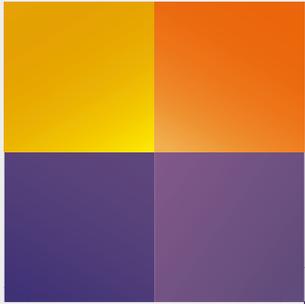
We will review the following four essential areas which must be in place for CRM success:

- Cleanliness, correctness, clarity and consistency of Data and Processes
- Whether the system is fit for purpose and simple to use
- The support and encouragement being given by Senior Executives
- The completeness of user adoption

The Health Check will be conducted by meeting with up to 10 people who have a good understanding of your business operations and should include stakeholders, management and staff. To get an internal view of how your current CRM system is seen and being utilized.

A report on the way forward will be provided.

This report is 'standalone'. At that point you may wish to ask LogiCRM to work on the recommendations or you may wish to continue by yourself.



For more information or to discuss how LogiCRM
can Unlock Your Customer Potential, please
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