

## **ALIGNING YOUR CRM STRATEGY WITH THE SALES PROCESS**

### **Asses the Current Environment**

1. Where are you today?
2. Where do you want to be tomorrow?
3. How do you prioritize to meet your goals and objectives?

### **What is the Definition of CRM and to Whom**

CRM – What does it really mean? Can it help us grow the business?

- What are the methodologies, software, and internet capabilities that help a company manage customer relationships in an efficient and organized manner.
- CRM programs represent a major investment for most companies, but many companies fail to measure their return.
- Top 5 reasons for employing a CRM system
  - Provide better customer service and turnaround times
  - Cross sell products more effectively
  - Increase revenues
  - Simplify marketing and sales processes
  - Acquire new customers with similar behaviors

**Conceptualize a process to integrate the CRM capabilities into the relationship that exists between the firm and its clients\*.**

**\*External & Internal Wholesalers and the Financial Advisors / Institutional Sales Person and the Business Opportunity / Wealth Advisor and the Investor.**

