

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: Establish Your Sales Channels & Sales Processes

What are our primary sales channels?

1. _____
2. _____
3. _____

What is our sales process?

Step Three: Map the Customer Journey

What are our customer touchpoints (website, ads, social media, and so on)

What challenges do our customers face?

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

Step Four: Select the Right CRM Software

What software requirements do we have?

CRMs to trial:

1.

2.

3.

Step Five: Plan for CRM Implementation

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 Six: Define Team Goals and Set KPIs

What are our team's performance-tracking SMART goals?

1. _____

2. _____

3. _____

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

1. _____

2. _____

3. _____