



Group Benefits CRM Introduction

Users and those interested in learning more about Group Benefits CRM are invited to join us for an

Overview of Group Benefits CRM Features and Capabilities Thursdays 1:30 PM CDT

[Click here for login instructions](#)



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Platinum, Gold, and Knotty Pine

Last week we discussed questions that should be answered before you begin looking for software to manage your client relations to save you time, money, and frustration. This week we look at the next step to finding and implementing the right CRM solution for your business: creating your wishlists.

Wishlists are the starting point of your system specification document. This is a good point at which to involve all of the users of your current system so you can find where all the time-consuming and costly inefficiencies and frustrations are hiding. The wishlists can be boiled down and prioritized once you have everyone's input. Getting the team involved at this stage will also prove invaluable when it's time to gain buy-in during implementation.

We suggest creating three wishlists for your new system (I'll explain why in a moment):

Platinum

The Platinum wishlist is the most difficult. We ask that you remove all constraints - budgets, current technology, manpower - and think about what you would like your CRM to do for you if you could have it do *anything* you want! None of us are accustomed to thinking without restraints because they are ever present, but this is key to having a system that really works for you.

Gold

More sensible, the Gold wishlist is what you aggressively but realistically expect your system to be doing for you within 12-18 months. It may not all fit in this year's budget, but the systems required to achieve these goals should be financially manageable over the 18-month period.

Knotty Pine

The Knotty Pine list is really a demand list, not a wish list. These are the essentials that the new system must do "out of the box" or it isn't worth considering.

Why create all three lists? While we realize that the Platinum list ***may*** never be fully achieved, without having a clear vision of what your perfect CRM would do for you, we'll never get close. Your wish lists will:



- Assist in determining the best solution for your needs
- Ensure that your top priorities are addressed by your solution
- Get "buy-in" from the users who have to make change succeed
- Guide your consultant so both short and long term goals are met

When you start your CRM project, give your CRM consultant the benefit of your Platinum vision so even when she is building your Knotty Pine framework, the initial foundation can support your long-term growth.

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