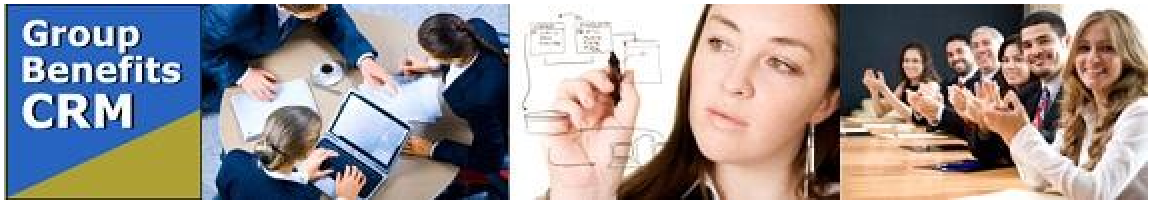

QUESTIONS TO ANSWER ***BEFORE*** LOOKING FOR A CRM

Before you start talking with CRM consultants, looking at demos, pricing options, or digging in further in your search, there are a number of key questions that can save you a lot of time, effort, and, potentially, money. The more clearly you can define the answers to these questions, the more quickly you will be able to sort through the myriad options and find the best solution for your business.

1. ***Are you sure that you want to change?*** To "do this right", you are looking at a significant change in the way your business is run. Even if the end result is a dramatic improvement, it is still change, and change is disruptive before the benefits are realized. To succeed, the owners and executive management of the firm ***must*** be absolutely committed to improving your systems.

2. ***What do you like best about your existing system?*** Why did you pick it in the first place? Why are you still using it? What must be carried forward into the new solution or changing is a "No go", regardless of potential improvements in other areas? What aspects of your current approach aren't "Go/No Go", but you'd really like to retain them?

3. ***What are your biggest issues with your current methods?*** List three, then get specific about how you want these areas to function in your new system. Next week we will talk about wishlists in more detail, but this is a starting point. "The Big Three" define why you are considering investment in change and will be key in determining which is the best solution for you.

4. ***How much is it costing you to keep doing what you're doing?*** Your frustration is the result of sensing that you are flushing money down the drain through inefficiencies and communications chasms. The process of quantifying accomplishes a number of things:

- By determining what you are spending to maintain the status quo, you will either have justification for making a change or know that the problem isn't substantial enough to bother.
- Monetizing wasted time, loss of business, and opportunity costs will clarify how much you can justify spending on an improved system.
- Defining the costs of various problem areas will quickly prioritize your requirements.
- Only by establishing a base point will you be able to evaluate the success of your transition.

Here are a few questions to help put a dollar value on your

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 Thursdays at 1:30PM CDT

Click here for login instructions

We look forward to meeting you Thursday!

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frustrations:

- How much time does it take to pull together information for your key reports? What are you paying the people who are doing this work? What could they do with that time that would be more profitable for the firm?
- How many clients have you lost in the past two years? What revenue had they previously contributed? Why did you lose them?
- What is the average revenue produced by a client? How many more clients would you be able to attract and manage with a system that reduced the grunt work and enabled you to do more of what you are in business to do?

5. ***What are you willing to invest*** to improve your sales, marketing, and customer service processes? This includes not only financial investment, but also time, management commitment, and computer systems. Do you want to lease or own? Invest once or a little at a time? Have control and responsibility for your system or let someone else manage it? How soon do you want to implement your new system? Having answers to these questions will enable you to quickly make rough cuts in your search.

Sharing the answers to these questions with your CRM consultant up front will help you quickly find a solution that will achieve your immediate goals within your budget and move you toward greater efficiency and profitability.

POWER TIME

We convert your sales, marketing, and customer service processes into easy systems that work.

20 Years of Service
Providing Trusted Customer Relationship Management Solutions