

Automation of customer relationships: CRM software implementation, or using the possibilities of my.gurtam.com to the maximum

Anastasiya Dubina

CRM-system Project Manager at Gurtam



Welcome to TelematiX!

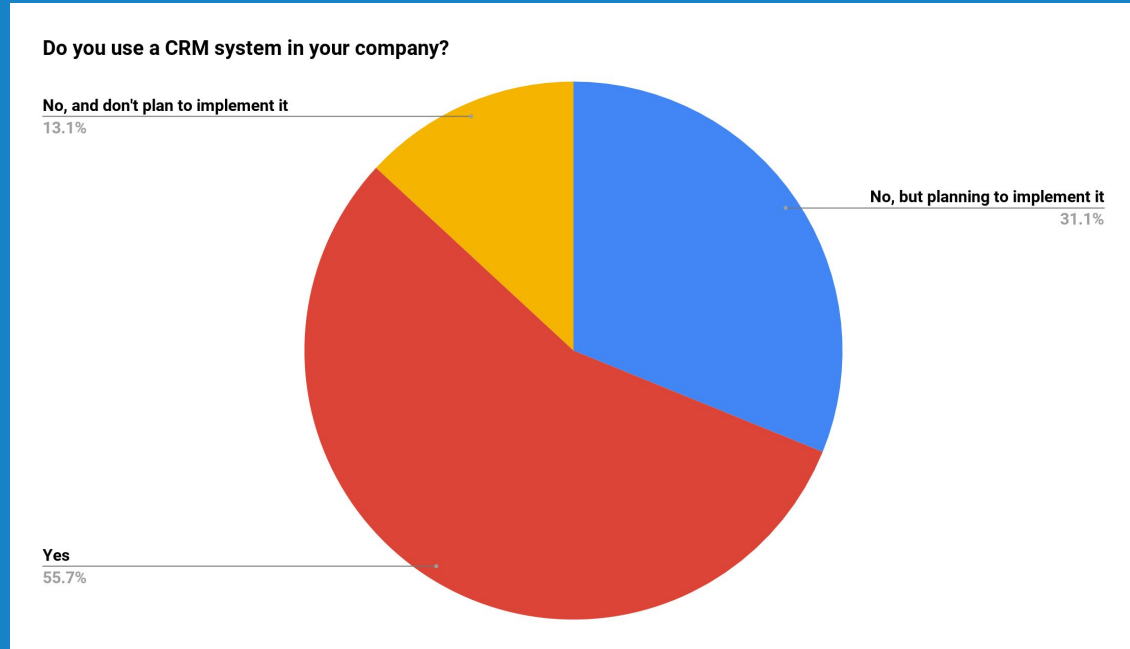
- ◆ Today: 4 trainings, 1 coffee break (12 pm - 12:30 pm), 1 dinner (1:30 pm - 3 pm), 1 buffet table (4 pm), 1 bus tour
- ◆ Please register for the bus tour at Infodesk
- ◆ Please write down your name, surname and company name on the sheet
- ◆ All question will be discussed in the end of the training

The stages of CRM development in Gurtam



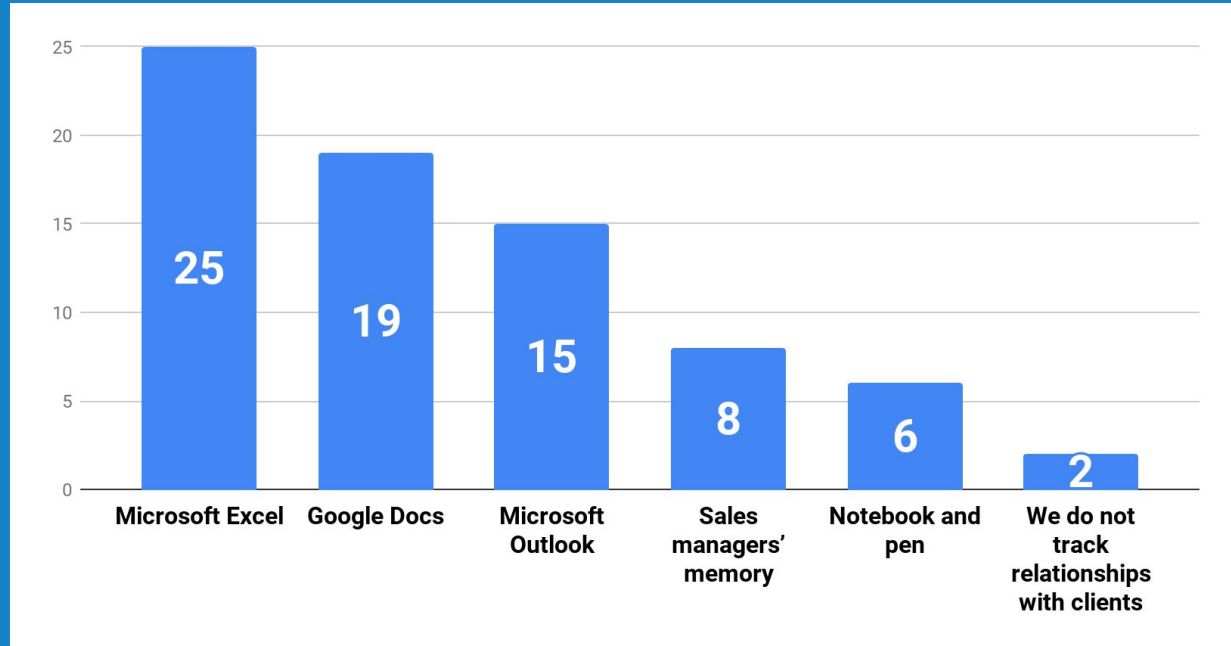
Use of CRM systems in Gurtam community

More than 50% of companies has already implemented a CRM system, 30% are planning to implement it



Popular CRM system replacements in Gurtam community

- ◆ Microsoft Excel
- ◆ Google Docs
- ◆ Microsoft Outlook



Step 1

**Find problems in
client relationships
and define goals of
CRM system
implementation**

①

Analyze the current
situation

②

Find problems in
the current situation

③

Define measurable
goals of a CRM
system
implementation





Analyze the current situation



Find problems in the current situation



Define measurable goals of a CRM system implementation

ELEMENTS OF ANALYSIS

- ❖ **Organizational structure**
- ❖ **Products and services provided**
- ❖ **Current and potential clients**
- ❖ **Algorithm of work with clients**
- ❖ **Marketing systems**
- ❖ **Analytics tools**



Analyze the current situation



Find problems in the current situation



Define measurable goals of a CRM system implementation

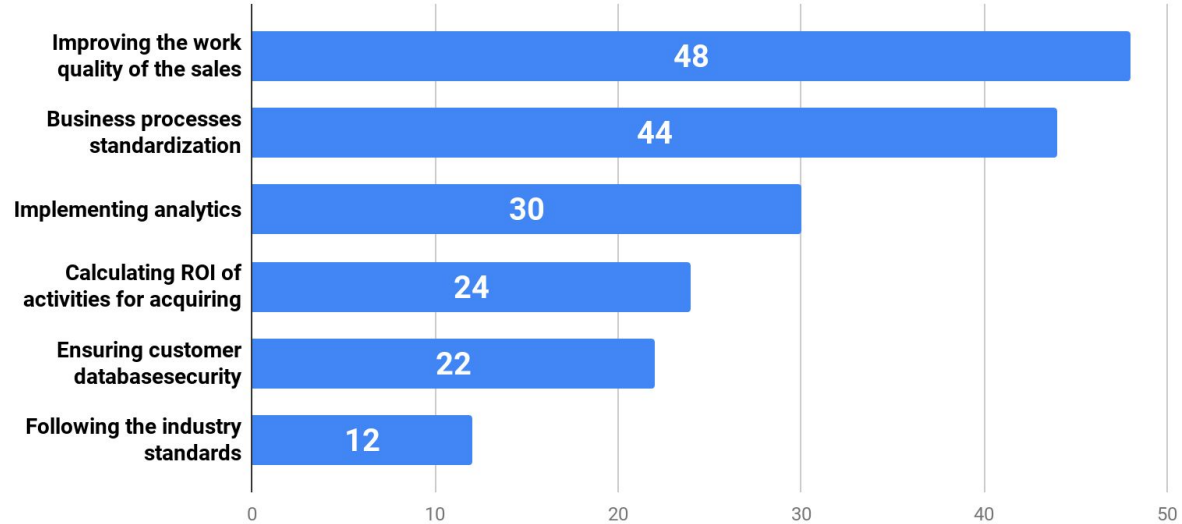
TOP 3 PROBLEMS RELATED TO THE ABSENCE OF A CRM SYSTEM

- ❖ **Lack of a single source of customer information**
- ❖ **Lack of manager actions logging**
- ❖ **Unclear business processes**



- Analyze the current situation
- Find problems in the current situation
- ③ Define measurable goals of a CRM system implementation

CRM SYSTEM IMPLEMENTATION GOALS OF THE GURTAM COMMUNITY



Step 2

Develop a technical specification on CRM system implementation



Business processes



Clients and contacts information



Managers work



Analytics





Business processes



Clients and contacts
information



Managers work



Analytics

BUSINESS PROCESSES STANDARDIZATION



**Map out business processes of
client relationships**



☐ Business processes

☒ 2 Clients and contacts information


☐ Managers work

☐ Analytics

WHAT INFORMATION SHOULD BE GATHERED?

- ❖ **Contact info**
- ❖ **Business info**
- ❖ **Hardware**
- ❖ **Units amount**
- ❖ **Technical support requests**
- ❖ **Financial info**
- ❖ **Social networks**

 Business processes

 Clients and contacts information

 Managers work

 Analytics

MOTIVATION OF ACCOUNT MANAGERS

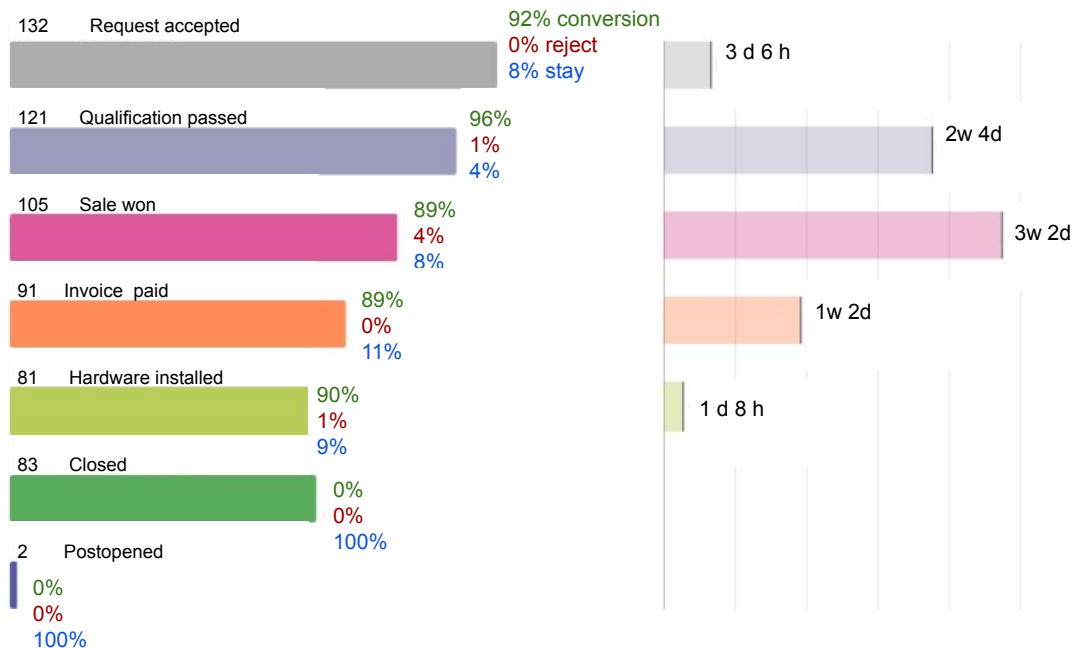
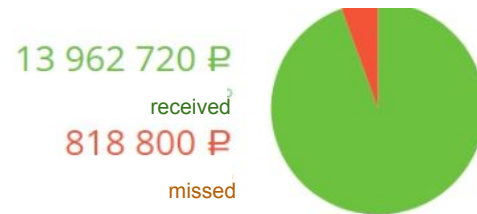
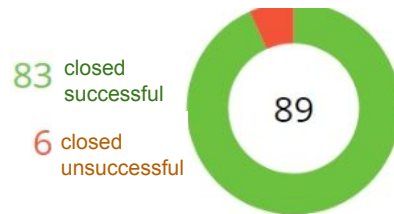
- ❖ **Work quality evaluation**
- ❖ **Logging actions**
- ❖ **ACL (access control list)**

Business processes

Clients and contacts information


Managers work

4 Analytics



Step 3

Search of a CRM system

- 
- ① Take into account potential company needs
 - ② Test the system on real processes
 - ③ Haven't found a suitable CRM system? Develop your own software

TOP 6 CRM systems of english speaking Gurtam community

- ◆ Custom-built software
- ◆ Zoho CRM
- ◆ Salesforce
- ◆ HubSpot CRM
- ◆ Freshsales
- ◆ SugarCRM




Step 4
**CRM system
implementation and
employees training**



Step 4

CRM system implementation and employees training

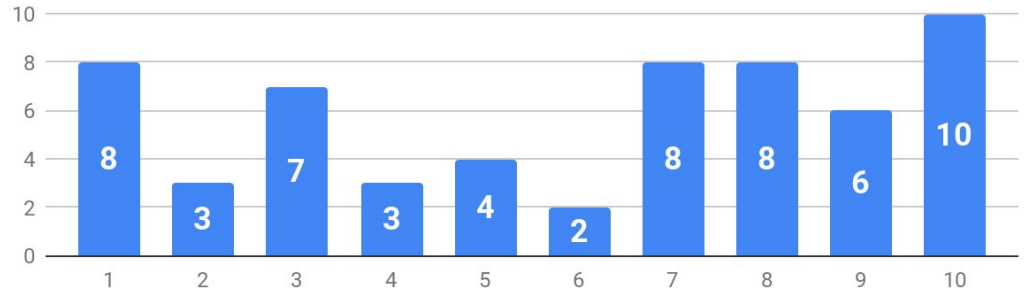
ADVICES ON EMPLOYEES TRAINING

- ❖ **Clarify goals of a CRM system implementation**
 - ❖ **Make written instructions**
 - ❖ **Monitor and direct**
 - ❖ **Arrange a competition on CRM system use and encourage winners**
- 

CRM functionality use in Gurtam community

More than 80% of companies don't use 20 and more percent of their CRM systems possibilities

Evaluation of the use of functionality on a 10-point scale



Step 5

System maintenance and user support



Update user guide



Employees support



Track progress
toward goals



Constantly improve your
CRM system



Step 6

Enjoy :)

STATISTICS OF THE IMPACT OF CRM SYSTEM ON THE COMPANY BUSINESS PROCESSES

Has the situation in your company changed after a CRM system implementation?

Nothing has changed

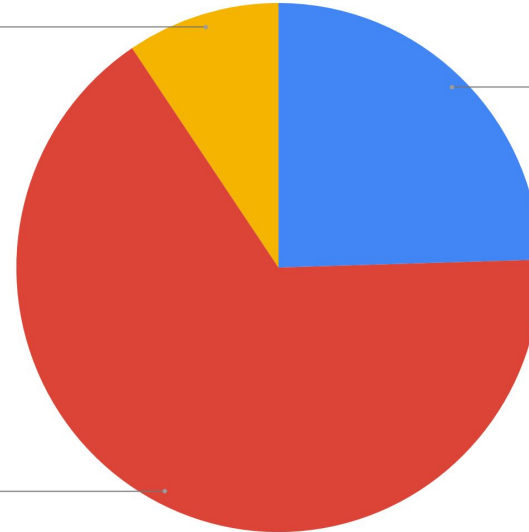
9.4%

We haven't analyzed the results

24.5%

Yes, it became better

66.0%



**Want a CRM system right
now? Welcome to
my.gurtam.com**





Anastasiya Dubina

My.gurtam.com Project Manager at
Gurtam

email a.dubina@gurtam.com
skype live:anastasia.dubina1606

Many people think: “We will implement a CRM system, when our company grows”. But in fact, you will grow precisely because you will implement a CRM system.



Thank you!

Anastasiya Dubina

CRM Project Manager at Gurtam

