

# CRM Coaching Services

*Helping Companies Get ROI from CRM*

## Program Goals & Overview

Our goal is to protect your CRM investment while generating maximum ROI. To accomplish this, team leadership must be fully engaged and aligned around the “How” and more importantly the “WHY” of your CRM strategy.

This highly productive coaching service, created from decades of experience in the Industrial market, will support the CEO for CRM and build confidence with key stakeholders and sales management that will improve overall CRM adoption.

## Engagement & Deliverables

- Weekly/Monthly monitoring including summary reports of CRM input, and team adoption based on expectations and KPIs.
- Weekly/Monthly coaching calls with the CEO for CRM and Sales Managers to establish SOPs, discuss best practices, and drive greater utilization.
- C'mon Man emails to Sales Managers on their teams CRM input.



**“He’s our advocate. He understands our organization and our needs. More than that he thinks like a Spartan and with 25 years’ experience, Brian knows how to tune and system and unlock its full potential.”** Adrian Vickers, VP Spartan Controls

## Justification

- This program will protect the investment, keep a spotlight on the CRM, and reinforce the importance to the team allowing managers to manage. CRM is a journey and not “one and done”. This program will keep it on track and set the stage for next steps.
- We will help design metrics around ROI from CRM and remove the “Feels likes we are getting some value out of it.”
- Hard \$ justification = an additional \$200K in sales, due to coaching the team on how to use CRM data to make smart business decisions.
- Call for a free analysis and consultation [Sales@salesprocess360.com](mailto:Sales@salesprocess360.com) or 504-957-8499