**CRM Coaching Services**

**MEMORANDUM OF UNDERSTANDING**

**Subject**: CRM Investment Protection and ROI Maximization Program

1. **Purpose**

This Memorandum of Understanding (MOU) outlines the agreement between [**Company Name**] and **SalesProcess360** to implement a CRM coaching service aimed at protecting the company's CRM investment and maximizing its return on investment (ROI).

1. **Program Goals and Overview**

The primary goal is to safeguard the CRM investment while generating maximum ROI. This will be achieved by:

* Ensuring full engagement and alignment of team leadership around the "How" and "WHY" of the CRM strategy
* Providing support to the CEO for CRM and early adopters
* Delivering high-quality CRM training to keep the team on track with their goals and objectives

1. **Engagement and Deliverables**

SalesProcess360 commits to providing the following services:

* Weekly/Monthly monitoring with summary reports of CRM input
* Team adoption assessment based on expectations and KPIs
* Weekly/Monthly coaching calls with the CEO for CRM and Sales Managers
* Review of Standard Operating Procedures (SOPs) and discussion of best practices
* "C'mon Man" emails to Sales Managers regarding their teams' CRM input

1. **Cost and Justification**

* Fee: $3,500 per month for up to 14 hours of remote coaching
* Additional fees apply for onsite visits, travel expenses, and special projects
* ROI metrics will be designed to justify the investment
* Hard dollar justification target: Consider just $200,000 in additional sales through improved CRM data utilization to cover the cost.

1. **Implementation Requirements**

To initiate the program, [Company Name] agrees to:

* Provide login credentials for daily CRM access to [Service Provider]
* Ensure management support for the program
* Set up recurring monthly and weekly meetings with the team
* Provide a list of team members and their contact information

1. Duration and Termination

This MOU shall be effective from [Start Date] and remain in force until terminated by either party with [30] days' written notice.

1. **Signatures**

[Company Representative] [Service Provider Representative]  
[Company Name] [Service Provider Name]

Sign and Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Sign and Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_