



CRM Strategy Preparedness

Self-Assessment

This simple self-assessment questionnaire is designed to help start the process of articulating and then implementing a successful CRM strategy.

It's built on my 25+ years of working with CRM and is deliberately designed to be free from jargon and technicalities. Instead, I hope that this will be the start of a conversation between us that will set you and your business on the right track to CRM success.

All answers will remain completely confidential (if you choose to share them with me) and will never ever be passed to anyone else. Equally important for you to know is that I work completely independently of any system vendors or software developers. Watch out - question 8 is the most difficult one to answer.

- 1 What is causing you to think about CRM now?

- 2 Which of the following applies to your business? (Choose as many as apply)
 - B2B
 - B2C
 - Private Company
 - Social Enterprise
 - Charity
 - Membership organisation

- 3 What proportion of your goods or services are bought online?

- 4 What is a typical transaction value for your goods and services?

- 5 Do you know what your retention levels are (Year to year)?

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- 6 How frequently would you expect a customer to buy from you?
- 7 Do you have a CRM system in place and if so – why are you looking to change?
- 8 How easy was it for you to answer these questions?

And finally, a bit about you....

Your name

Your company

Your role within the organisation

Your preferred contact details

I hope that you want to share the responses to these questions with me. I'd love to chat through them with you, offer the benefit of my impartial expertise and to see if there is a way that I can help you.

Please send any completed responses to Joe@joelynychconsulting.co.uk

Or call me on 07921 038051 to chat through any thoughts or questions you may have.

Thanks for your time.

Joe

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