



**PLAN • PROCESS • EXECUTE • RESULTS**

**COMPANY:** Leading Marketing Information Services Company to Healthcare and CPG industries

**ISSUE:** Company was dissatisfied with performance of sales organization. In addition, Company did not have an adequate enterprise system to track of marketing, sales and customer service activities to enhance client relationships.

**ROLE:** CRM Transformation Specialist

#### **HIGHLIGHTS**

- Facilitated series of focus group sessions to document current process flows/issues
- Completed data acquisition to help client executive team decide whether to rewrite existing system versus implement new system
- Jointly Facilitated development of new Sales Process, incorporating Solution Selling Methodology
- Developed Best Practices-based Account Planning Methodology
- Contributed to development of comprehensive functional requirements statement (by workgroup) for required CRM solution
- Helped Company identify and evaluate four potential CRM solution vendors, leading to decision to implement Siebel Systems.

#### **RESULTS**

- Client was able to implement a consistent Account Planning methodology and sales process across its sales division.
- Through functional requirements development client received properly configured Siebel application.