



Business Unit: Enterprise
 Provided by: Demand Chain Systems
 Powered by: Growth Diagnostic
 Participants: 15

CRM Diagnostic Summary Report for ACME Company

Below is a summary report of the CRM Diagnostic you completed recently. It includes your overall maturity level, your average maturity level by functional area, and your highest-rated and lowest-rated areas. It also includes Demand Chain Systems' recommendations for improving your lowest-rated areas. For more in-depth reporting, or if you have any questions, please contact Tina Hebert. 612-710-0923 or email Tina at tina@demandchainsystems.com. Thank you!

1. Average Maturity Level and Summary Recommendations

Currently, your organization has an average maturity level which represents a general understanding of the business capabilities which drive the value of a CRM solution. As a result, your current CRM efforts should primarily be focused on business process definition and/or process training. Your CRM technology focus should be on ensuring critical data is collected and maintained. Current efforts should avoid measuring effectiveness, but focus on process speed and consistency.



2. Average Maturity Level of Each Functional Category

◆ Highest Score ▲ Lowest Score

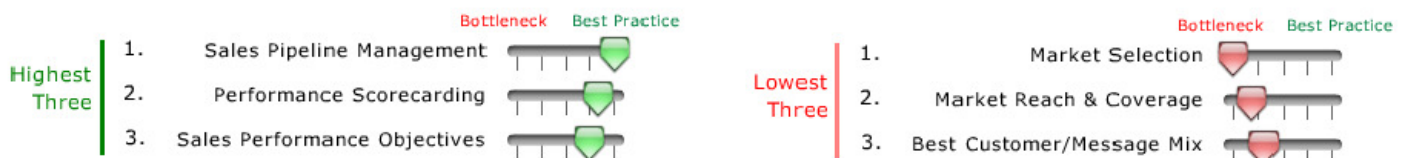


The bar chart to the left shows your results in the nine functional categories included in the diagnostic.

For more information
info@growthdiagnostic.com

3. Your Highest and Lowest Rated Areas

Based on the results of your diagnostic, the highest three areas on the left are those in which you are most likely to achieve CRM success. The lowest three represent those which are having the greatest negative impact on accelerated growth.



IMPORTANT NOTE: Due to complex interdependencies across all performance capabilities, the greatest strengths and weaknesses to performance are not directly associated with lowest average maturity scores.

4. Performance Recommendations for Your Lowest Rated Areas

Below are our recommendations for improving your three lowest rated areas. By continually focusing on improving your bottlenecks while leveraging your best practices, CRM Success will be realized through optimal growth. (Best Practice: 🟢 Bottleneck: 🟡)

Market Selection

Description: Growth is heavily impacted by the ability to identify, define and focus limited resources on the best possible customer segments.

- 🟡 Analyze customer performance and identify profiles which deliver highest performance.
- 🟡 Identify and prioritize unique market segments for each product and service.

CRM Technology: Account, Segmentation, List Management, Reporting, Analysis

Market Reach & Coverage

Description: The organization must reach the customers it determines will produce needed revenue in order to drive optimal results.

- 🟡 Sustain processes and training teams to focus on markets with greatest impact.
- 🟡 Continually allocate marketing and sales resources to adequately reach target markets.

CRM Technology: Contact, Territory Assignment, Lead Distribution, Account Teams, Contact/Account Ownership, Reporting, Dashboards

Best Customer/Message Mix

Description: Connecting a specific customer in the CRM database with a targeted message and content drives overall productivity.

- 🟡 Identify and prioritize specific customers by matching them with a best customer profile.
- 🟢 Develop and apply targeted messaging to each unique customer segment.

CRM Technology: Segmentation, List Management, Email and Word Templates, Email Merge