# **CUSTOMER RELATIONSHIP HEALTH CHECK**

Optimize your customer experience processes and reinvigorate your customer relationship culture.



A Customer Relationship Health Check provides a vision and an actionable road map to organizations looking to better understand and serve their current and future customers and to optimize the customer experience.

Investing in a customer relationship management (CRM) system and processes enables organizations to:

- Increase/drive revenue
- Offer relevant and contextual products and services
- Deliver those products and services efficiently and via channels of customer choice

# Gain insight into your most important relationships

Our Customer Relationship Health Check assesses the existing people, processes, and technology surrounding customer relationships and identifies gaps and future-state recommendations for alignment to and enabling of strategic goals and objectives.

What organization is able to sustain, thrive, and grow without attention to its lifeblood: its people and its customers? With the advent and advance of technology, the art of the customer experience has

truly been transformed into the science of customer relationships. Today, technology can enable an organization to become more focused on its customer experience by providing actionable insights.

Our experience proves that optimizing customer processes through enabling and aligning technology solutions, including CRM, helps organizations realize and execute against these imperatives.

**Customers** are often more than **70%** through the sales cycle before they talk to you 75% of organizations believe CRM version of the truth Average number of and point of data connected devices 3 for 1 entry regarding your customer relationships For every piece of data entered into a system supporting customer relationships, three pieces of value should be delivers operational leveraged by a efficiencies and cost customer-facing savings professional available to the user



# **USTOMER RELATIONSHIF**

- Align customer relationship and experience processes with organizational strategies and goals
- Accelerate organizational growth by focusing on customer relationship and experience process optimization
- Access domain expertise and industry best practice analysis, deliverables, and outcomes

# Organizational **Analysis**

# **Technology Analysis** (including CRM)

## **Deliverables and Outcomes**

- Strategy, goals, and objectives
  - People and process review
  - Gap analysis
- Current tool and technology review
- Gap analysis
- Potential enhancements
- Investment analysis



Wipfli performs an organizational analysis of your overall business and identifies improvement opportunities for alignment to and enabling of strategic goals and objectives.

Wipfli performs a complete assessment of your current customer relationship technology and tools and identifies gaps, potential short-term and future enhancements, and the required investment to move forward.

Equipped with insights from these analyses, Wipfli outlines deliverables and outcomes that support the organization's goals and strategic priorities. Outcomes include findings, insights, road maps, and charters, as well as proposals-with internal effort, external effort, or a combination of both-to address the recommendations identified.

Health Check Options	STANDARD	SELECT	PREMIER
Customer Relationship Health Check (required)			
High-level organizational process review	•	•	•
Gap analysis	•	•	•
Prioritized improvement recommendations	•	•	•
Investment analysis		•	•
Business road map			•
Technology Health Check (optional add-on)			
Current tool and technology (including CRM) review	•	•	•
Gap analysis	•	•	•
Prioritized recommendations/improvement opportunities	•	•	•
Growth and CRM process review and detailed system review		•	•
Technology investment analysis		•	•
KPI and industry benchmark analysis		•	•
Interviews with relevant people/users			•
Interview/facilitated session notes			•
Expanded survey results (named or anonymous)			•
Customer road map (including CRM)			•
Charter, including organizational chart/roles analysis			•
Formal presentation of findings			•