



e-book

assess the maturity of your CRM processes

A practical guide for the
growing company

xrmvision.com/maturity



THE PURPOSE OF THIS GUIDE?

Implementing or optimizing an internal process, will undoubtedly destabilize the established structure of a company. While these changes are usually wanted, we must ensure that their positive outcomes will be pertinent and sufficient enough to outweigh the period of instability that will come with these changes. Planning a smart implementation, becomes even more crucial in the case of a CRM since many of the company's processes will be affected by its repercussions. The implementation must be adapted to the operational procedures of the company and broken down into several stages allowing employees to gradually grasp and gain control of these changes. Starting an operational optimization project by using a process maturity assessment, will enable the following:

- ◆ Prioritize changes that have immediate positive effects on the operations of the company
- ◆ Sway your employees towards change by increasing their daily efficiency
- ◆ Make sure the company is ready to ride every wave of change
- ◆ Establish the expected benefits that each change will bring

These are the reasons why each of our projects begin with an analysis of our clients' CRM situation, in other words, assessing the maturity of its processes. We believe that a similar methodology should be used for every project having an impact on the key activities of your company.

WHAT IS MATURITY ASSESSMENT?

The term "maturity" refers to the stage of control and optimization in the processes of a company. It is defined as follows:

"A maturity model is a set of structured stages describing the extent to which the behaviours, practices and processes of a company can reliably produce and repeat desired actions and results, regardless of the individuals being assigned to each task."

By assessing the maturity of a process, it is possible to gain a better understanding of the extent to which the company masters a certain process. In an optimization and change context, this assessment also makes it possible to anticipate the capacity needed in changing a process.

WHY MUST WE KNOW THE MATURITY OF OUR PROCESSES?

Evaluating the maturity of processes that are linked to a certain sector in your company, will allow you to capture the weaknesses and the main opportunities for improvement. In what relates to change, a maturity assessment also enables you to anticipate the necessary measures in modifying a process and the ability of these processes to undergo any change. Consequently, it would require more effort to change a mature process requiring more resources and is firmly anchored in the operations of your company, than it would to modify a process in which employees have less expertise. Since the latter requires a smaller number of resources in which employees are less proficient, optimization will often be done in a gradual manner allowing the company to assimilate each change in their daily tasks while continuing to base their activities around these processes.

Low maturity stage process

Advantages	Disadvantages
<ul style="list-style-type: none"> ◆ A smaller number of resources are affected ◆ Potentially significant gains for the invested efforts ◆ Increased flexibility due to lack of structure 	<ul style="list-style-type: none"> ◆ Information is hard to gather and organize ◆ Potential reluctance on the part of individuals

High maturity stage process

Advantages	Disadvantages
<ul style="list-style-type: none"> ◆ Opportunity for strategic gains for the company ◆ An extended view of the company's generated profit 	<ul style="list-style-type: none"> ◆ The processes to be modified are more rigid ◆ A great number of resources must be mobilised ◆ Greater resistance to change

CAPABILITY MATURITY MATRIX

Understanding this tool

The Capability maturity matrix is used to identify a series of processes related to a certain field within your company while defining its maturity. This tool makes it possible to understand the gaps needed between each process and to prioritize and improve the processes that are less understood.

The Capability maturity matrix is broken down into 5 principal stages:

01

Initial or chaotic

At this stage, the process is established without any reliable method. It is poorly documented and **relies on the individuals** who are heroically operating it. Its execution is **unpredictable, difficult to repeat** and will be delayed should the individual on who it depends leave the company.

Key indicator:

- *To understand a certain process, you must interrogate the person operating it.*

02

Managed

At this stage, the processes **can be repeated** and will generate **predictable and consistent results**. The organization no longer depends on a single individual and the risks are reduced. It is unlikely however, that this process will be applied rigorously since it remains **poorly documented** despite some knowledge sharing within the company.

Key indicators:

- *The same tasks can be performed in a similar way by several employees*
- *The know how is not documented*

03

Defined

Once this stage has been reached, the process is **documented** and **is no longer dependent on individuals**. By standardizing its execution, **the company appropriates this process and the risks are significantly reduced**.

Key indicators:

- *Your processes are documented*
- *This documentation evolves little over time.*
- *The efficiency of processes is presumed to be unsubstantiated by data*

04

Measured

This fourth stage is defined by applying various **conditions that will determine the effectiveness of the processes**. Performance data is **gathered and analysed** ensuring stability and allowing for a periodical improvement of the company's procedures.

Key indicators:

- *Performance reports are produced on a regular basis*
- *Processes are improved according to the recommendations of these reports*
- *Processes are improved because of decisions made by management*

05

Optimizing

In this last stage, the processes are constantly being monitored and optimized according to the received feedback. Its optimization can either be automated or derive from the various stakeholders involved in its implementation. The company has full control over the implementation of the process tasks.

Key indicators:

- *The processes' efficiency is improving continuously*
- *Certain processes are automated*
- *Patches are applied from time to time according to the observations of various parties involved*
- *Optimization decisions are founded on data*

The advantages of a visual model

The CMM has the advantage of offering a visual representation of the maturity of your activities. By consulting it, you can identify at a glance the weakest processes and locate the average for a category of activities.

This visual and intuitive representation also allows for faster information sharing and assimilation. This example refers to the marketing capabilities of a company.

BUSINESS PROCESS	CHAOTIC	MANAGED	FORMAL	MEASURED	OPTIMIZED
SOCIAL MEDIA	<ul style="list-style-type: none"> A business page managed by someone in the organization. No documented and communicated guidelines. Ad hoc publications with the absence of a content schedule. 	<ul style="list-style-type: none"> Uniformed executive profile with cooperative messages support. Follow up on the network growth, lead and visits statistics. Social media use and staff training policies. 	<ul style="list-style-type: none"> Use of the platform for BuDev (recruiting contacts). Adapted content management and editorial networking plan. Centralized and protected management of the admin access. 	<ul style="list-style-type: none"> ROI measurement of the business process for the enterprise. Escalation process and crisis management with ready answering plans. Use of social media for the business for the business insight collect. 	<ul style="list-style-type: none"> Systematic analytic process and post-mortem optimization. Personalized messages to users.
NEWSLETTERS	<ul style="list-style-type: none"> Email addresses collection without accurate and documented process. Email addresses and client contact lists decentralization. Sending of punctual newsletters following requests. 	<ul style="list-style-type: none"> Defined and standardized sending schedule with marketing activities. Centralized and standardized management with specialized software. 	<ul style="list-style-type: none"> Users consultation analysis (clicks). Maximum sending control setup. Subscriptions growth strategy. 	<ul style="list-style-type: none"> ROI measurement of the business process for the enterprise. Messages segmentation based on statistic measure. A/B content tests, communication layout and format. 	<ul style="list-style-type: none"> Systematic analytic process and post-mortem optimization. Personalized communication by the client status in his sales cycle.
WEBSITE	<ul style="list-style-type: none"> Organic and basic SEO on principal pages. Presence of a content management tool without any approbation management. Statistics follow-up system on principal pages. 	<ul style="list-style-type: none"> Presence of calls to action on the entire landing pages. Integration of a web lead conversion system. Presence of support tools to the sales force and ambassadors. 	<ul style="list-style-type: none"> Documented process on the management and content update. Versions and process content approbation administrator. Optimization of error pages (404). 	<ul style="list-style-type: none"> ROI measurement of the business process for the enterprise. Web site ready for easy syndication of its content. Segmentation and A/B testing of contents. 	<ul style="list-style-type: none"> Systematic analytic process and post-mortem optimization. Content personalization capacity based on the visit status.
STATISTICS CONTROL	<ul style="list-style-type: none"> Statistics data compilation with the use of second generation tools. Accessibility to the internal data through manual requests. Ability to interpret basic statistic data. 	<ul style="list-style-type: none"> Data statistics centralized in a management system. Conversion of the data in unified and compatible formats. Control and management of error margins. 	<ul style="list-style-type: none"> Automized validation system of statistics data. Standardization of the nomenclature of tagging and tracking. Executive table boards with definition and follow up of the KR. 	<ul style="list-style-type: none"> ROI measurement of the business process for the enterprise. Profile management based on a corporate segmentation. Ability to disseminate business intelligence in different units. 	<ul style="list-style-type: none"> Systematic analytic process and post-mortem optimization. External data integration and of the Big Data in the data governance.
MEDIA ECOSYSTEM	<ul style="list-style-type: none"> Existing medium term marketing strategies and planification. Misurable goals and ownership of clearly attributed channels. Respect of budgets and social media timelines. 	<ul style="list-style-type: none"> Evaluation of the money value of the virtual actions (earned media). Periodic increase of the value of owned and earned marketing. Control of the distribution by channel of the campaign in progress (bought). 	<ul style="list-style-type: none"> Strategies optimization in a continuous manner (in-flight). Budgetary flexibility depending of the performance (no commitment). Measuring the conversion and not just by clicks or impressions. 	<ul style="list-style-type: none"> ROI measurement of the business process for the enterprise. Communication program with brand ambassadors. Experimentation budget and pilot project with success measure. 	<ul style="list-style-type: none"> Systematic analytic process and post-mortem optimization. Systematic planification (bought and earned) based on performance.
LEAD GENERATION	<ul style="list-style-type: none"> Individual and group activities in Inbound and Outbound. Presence of management system of uncontacted leads. Defined process of the attribution of leads by representative. 	<ul style="list-style-type: none"> Conversion objectives by sale channel. Known sales process and cycle, documented and communicated. Systematic take over of the leads when a seller or employee leaves. 	<ul style="list-style-type: none"> Evaluation mechanism of leads outbounds availability (leads scoring). Documented and automatized process of lead generation. Management of offline leads (ex: trade show). 	<ul style="list-style-type: none"> ROI measurement of the business process for the enterprise. Capacity to qualify the leads based on real time action. Documentation of a lead life cycle with the ability to raise. 	<ul style="list-style-type: none"> Systematic analytic process and post-mortem optimization. Management and supervision of the generated leads by third parties.
SEARCH ENGINE MANAGEMENT	<ul style="list-style-type: none"> Adwords adhoc purchase without any strategy or planification. Ponocutal budget related to a project or an experimentation. Limited ability to modify keywords on the web site / landing page. 	<ul style="list-style-type: none"> Keywords performance analysis and auction optimization. Strategic search for the keywords selection (internal, competition, brand). Separation of the acquisition objectives and contingency. 	<ul style="list-style-type: none"> Content table / online branded and unbranded keywords with the brand and products. Integrated campaign with an editorial schedule and documented processes. Creation and increase of the performance indicators evenly. 	<ul style="list-style-type: none"> ROI measurement of the business process for the enterprise. Transcendence of business process in the entire organization. Acquisition strategy and loyalty of the ambassadors (virtual ones). 	<ul style="list-style-type: none"> Systematic analytic process and post-mortem optimization. Market based retargeting and key words auction strategy in support to the entire business processes.

Dynamic testing

By presenting both the stages of maturity achieved and those targeted, the CMM allows you to re-evaluate your processes quickly and regularly to know the progress achieved throughout your optimization activities.

You can then do a periodic revalidation to ensure that the criteria for the current stage of maturity are being met. You will know what actions need to be taken and when a subsequent crossing should be planned.

MATURITY ASSESSMENT IN A CRM CONTEXT

Positive effects throughout your company

The benefits of using a CRM (Customer Relationship Management) tool, are not limited to your sales activities. When it comes to customer service, marketing and operational productivity, this tool can generate significant gains when used properly.

Starting a CRM implementation or optimization project with a maturity assessment will provide a comprehensive overview of the affected processes and individuals. It is then possible to adapt the implementation plan to their reality and their level of expertise in the tasks already performed by each of them.

Since CRMs are highly flexible and customizable tools, this analysis makes it possible to take advantage of every opportunity, to simplify and provide a more efficient daily work life to the affected employees.

The performance assessment process

Over time, a CRM will evolve alongside your company. The maturity matrix will focus on a series of processes that need to be improved and will then support an implementation phase of your CRM.

Once this implementation is finished and grasped, this same matrix can be improved and be applied to another critical field of your company. You are then able to identify potential additions to your CRM that will help you to improve this field. It is then futile to multiply the tools.

Self-evaluation

While it can be advantageous to have your processes evaluated externally, the maturity matrix provides a reliable and simple self-evaluation. If you are interested in getting a glimpse of your own company's situation, you can fill out our [online self-evaluation questionnaire now](#). This exercise only takes a few minutes to complete and will give you an instant glimpse of your company's maturity level.

For results that reflect your reality as accurately as possible, we recommend that you start by consulting with the departments that are involved in the realization of each evaluated process. This method is the only one that will provide you with an exact report. To do this, start by making a list of the employees involved. You can then have them fill out the tool on an individual basis, using questions like the ones our consultants would use if they were to have a meeting with each of them. Lastly, we recommend reaching a consensus by sharing and discussing all the gathered responses.

This exercise can be repeated on a regular basis throughout the growth of your company or can be repeated after the implementation of other major projects.

MOVE INTO ACTION - HOW TO EVALUATE YOUR COMPANY

For a reliable evaluation, that truly reflects the reality of your company, we recommend completing the questionnaire by consulting the departments affected by each process. You will see that evaluating the maturity of your processes is an easy step that promotes employee participation and commitment. This evaluation is usually done using 5 key steps.

01

Identify key processes

The first step includes choosing what processes or fields of activities need to be evaluated. To do this, it is preferable to choose the processes that have a strategical impact on the projects we wish to implement, as well as those halting the growth of the company. Each process is then represented by a maturity matrix curve and questions or tests are then linked to each maturity phase of these processes.

02

Identify the key individuals

Once the processes to be evaluated have been decided, it is important to know the individuals that will ensure its realization and the ones who will be affected by it. These can include, the employees operating the process, the management, clients or even suppliers. The goal is to bring a group of individuals together to gain a complete view of the different aspects of each process.

03

Complete the questionnaires

Tackle the entirety of the questions related to evaluating the processes. By consulting with each identified individual, start answering the questions related to the chaotic process and gradually move towards the questions pertaining to the optimization stage.

The questionnaire can be filled out as a group, or by having individual meetings with each of the parties involved. We usually suggest doing a group self-evaluation as it can generate better discussions. The intervention of a third party on the other hand, is usually done on an individual basis since it allows individuals to express the frustrations they feel but would not have the courage to express in front of their colleagues and managers.

Recommendation

To evaluate your sales processes and obtain a pre-analysis of their maturity, enter your answers directly into our Web tool by clicking on xrmvision.com/maturity

04

Assess the results

Once all the participants have answered the questions, the gathered information needs to be consolidated and a consensus needs to be reached for each question.

05

Move into action

Once the evaluation has been completed, we must assess the status of the company, so we can prioritize our optimization efforts. Once this is done, we can focus on reducing the gap between the more mature processes and the more chaotic ones; we can either, optimize the processes that are best managed and capitalize on the strengths of the company, or we can try to reduce the risk that could be caused by the most chaotic activities. Prioritization, will depend on the reality and the strategical goals of each company. We usually begin a software implementation by improving its weaknesses and reducing the gaps between the different processes to enable the implementation of a tool that will provide a significant enhancement throughout the activities of the company.

The standardization of the maturity processes also increases internal mobilization, since all employees are able to work with the same mindset and share a common work pattern.



IT'S YOUR TURN!

Are you ready to assess the maturity of your CRM processes? Fill out the questionnaire and obtain the status of your CRM's maturity processes at

www.xrmvision.com/maturity

To help you prepare, a simplified version of the XRM vision matrix is also made available to you by going to the next page. Use the XRM matrix and our web tool to record the results and monitor your progress over time.

If needed, our consultants can also help you identify the most effective methods to optimize your processes.



The XRM Vision maturity matrix

The evaluation process of the XRM Vision team, is founded on the below matrix. We encourage you to use it and adapt it to your reality, so you can obtain a full and precise understanding on the maturity of your CRM processes.

Company processes	Chaotic	Managed	Defined	Measured	Optimizing
Business management	<ul style="list-style-type: none"> Company information is entered on an ad hoc basis without documented processes Business information is decentralized 	<ul style="list-style-type: none"> Processes are standardized and planned to build and manage the database for companies 	<ul style="list-style-type: none"> The list of businesses is the same in different systems (CRM, ERP, other) The process of updating business information is automated 	<ul style="list-style-type: none"> Measuring the ROI of the process versus the objectives of the company Measuring the database evolution of companies and its obsolescence over time. 	<ul style="list-style-type: none"> The process is constantly improving The business files are deduplicated through an automated process
Contact management	<ul style="list-style-type: none"> Information is entered on an ad hoc basis without documented processes Contact information is decentralized 	<ul style="list-style-type: none"> Processes are standardized and planned to build and manage the database for contacts Centralization of the company contacts in a single CRM 	<ul style="list-style-type: none"> Launching processes of contacts in the email management application (e.g. Outlook) The list of contacts is the same in different corporate systems (CRM, ERP, other) Automating the process of contact information updates 	<ul style="list-style-type: none"> Measuring the ROI of the process versus the objectives of the company Measuring the database evolution of companies and its obsolescence over time. 	<ul style="list-style-type: none"> The process is constantly improving The contact information is deduplicated through an automated process

Company processes	Chaotic	Managed	Defined	Measured	Optimizing
Management of prospects	<ul style="list-style-type: none"> Defined process for assigning representatives 	<ul style="list-style-type: none"> Conversion objectives using touchpoints through different channels Qualification process is documented and qualified Processes are documented if an employee leaves the company 	<ul style="list-style-type: none"> Lead scoring mechanism to prioritize actions Documented and automated lead generating process Non-digital event prospect management (e.g. Trade show) 	<ul style="list-style-type: none"> Measuring the ROI of the process versus the company objectives Ability to assess the quality of a prospect based on their actions Documenting the life cycle of a prospect with the capacity of improving it. 	<ul style="list-style-type: none"> The process is constantly improving Proactive follow ups and management of prospects being generated by external agents
Management of opportunities	<ul style="list-style-type: none"> The quality and quantity of available data is subject to the individual doing the data entry Each representative tracks their own opportunities without using a specific sales process 	<ul style="list-style-type: none"> Opportunities are available in a centralized system The system contains information such as probability gain, opportunity value estimates and closing dates. The client's key individuals (influencer, decision maker etc.) are identified and classified by opportunity in the system. Systematic reassignment process when an employee leaves the company 	<ul style="list-style-type: none"> Current opportunities are done directly in the centralized system The next steps to be followed are recorded and monitored in the system The details required for production are entered in the system 	<ul style="list-style-type: none"> Measuring the ROI of the process versus the company objectives The evolution of the sales pipeline over time is monitored via a centralized system The system highlights the exceptions that must be discussed 	<ul style="list-style-type: none"> The process is constantly improving Information regarding the opportunity is used for production planning Information regarding the opportunity is used for financial planning

Company processes	Chaotic	Managed	Defined	Measured	Optimizing
Managing sales activities	<ul style="list-style-type: none"> The representatives use their instinct to guide them through their contact strategy Emails are stored in the inboxes of each employee 	<ul style="list-style-type: none"> Client interactions are systematically entered in a centralized location 	<ul style="list-style-type: none"> Client interactions are documented in CRM as they happen (mobile application) 	<ul style="list-style-type: none"> Measuring the ROI of the process versus the company objectives Customer coverage analysis is available in real time 	<ul style="list-style-type: none"> The process is constantly improving Proactive customer coverage plans issuing warnings to advise of unusual situations
Customer service management	<ul style="list-style-type: none"> Each customer request is treated according to the best effort approach Each customer contacts someone they know within the company to get support 	<ul style="list-style-type: none"> Centralized entry of all client requests using a standardized form Queue management to distribute incidents Customer service information made accessible to other employees having client relations Each customer request has a unique identifier 	<ul style="list-style-type: none"> Use of knowledge base articles to facilitate incident resolution Incidents are automatically assigned according to established business rules Customers have the possibility of entering their incident on a centralized portal 	<ul style="list-style-type: none"> Measuring the ROI of the process versus the company objectives Management of service levels by incident type and customer Automated escalation when service levels are at risk Clients can access the knowledge base in self-service mode 	<ul style="list-style-type: none"> The process is constantly improving Ability to continuously ensure the resolution of a case despite employee turnover

Company processes	Chaotic	Managed	Defined	Measured	Optimizing
Management of marketing campaigns	<ul style="list-style-type: none"> • Campaign management in ad hoc mode • Campaigns based on a subjective knowledge of clients 	<ul style="list-style-type: none"> • Consolidating different campaign activities under one primary campaign • Manually coordinating execution sequences • Campaign information is entered in one corporate system • Establishing clear processes to know and understand the clients 	<ul style="list-style-type: none"> • Campaign automation is made possible • Marketing decisions are made according to the established personas for each targeted market • Marketing decisions made based on the customer journey for each targeted market 	<ul style="list-style-type: none"> • Measuring the ROI of the process versus the company objectives • Real time analysis of campaign results • Ability to plan multichannel campaigns and to automate their delivery • Matching campaigns with each sales opportunity in the system; creating a link between marketing efforts and sales results 	<ul style="list-style-type: none"> • The process is constantly improving • Ongoing review of the personas and their customer journey based on experience
Telemarketing activity management	<ul style="list-style-type: none"> • Management of non-automated call lists • Information regarding the results of the call are documented using notes 	<ul style="list-style-type: none"> • Contact sources are consolidated into a single corporate system • Managing call lists to be completed by linking them to specific campaigns • Documenting results for each call 	<ul style="list-style-type: none"> • Rules limiting the number of mailings sent per person • Calculating the conversion rate per customer and per campaign 	<ul style="list-style-type: none"> • Measuring the ROI of the process versus the company objectives • Measuring the efficiency of the qualification criteria met by respondents for each campaign 	<ul style="list-style-type: none"> • The process is constantly improving

Company processes	Chaotic	Managed	Defined	Measured	Optimizing
Event managing	<ul style="list-style-type: none"> • Being present at an event and being in “waiting for visitors” mode 	<ul style="list-style-type: none"> • Documenting visitor information to follow up with them after the event 	<ul style="list-style-type: none"> • Automated invitations and on-site management process • An integrated approach to multi-channel monitoring (email and voice) 	<ul style="list-style-type: none"> • Measuring the ROI of the process versus the company objectives • Linking campaigns to each sales opportunity in the system to compare the marketing efforts vs sales results 	<ul style="list-style-type: none"> • The process is constantly improving
Newsletter	<ul style="list-style-type: none"> • Contact information is entered on ad hoc basis without any documented process • Contact and client information is decentralized • The newsletter is sent on a timely basis after specifically being requested 	<ul style="list-style-type: none"> • Standardized and planned process in conjunction with online marketing campaigns • Centralized management of mailings through a specialized system 	<ul style="list-style-type: none"> • Analysis of recipient commitment (CLIC) • Rule to limit the number of mailings sent per person over a period of time • Strategy to expand the list 	<ul style="list-style-type: none"> • Measuring the ROI of the process versus the company objectives • Dividing content based on defined criteria related to the targeted audiences • A/B type testing for titles and presentation 	<ul style="list-style-type: none"> • The process is constantly improving • Personalized communication per customer according to the progress in their sales and service life cycle

Company processes	Chaotic	Managed	Defined	Measured	Optimizing
Reporting	None	<ul style="list-style-type: none"> The information must be entered everyday in a centralized file (e.g.: Excel) The information must be extracted from the system to show a result 	<ul style="list-style-type: none"> Operational dashboard used within the system(s) The formatted information can be viewed in a connected file (e.g. Excel connected) 	<ul style="list-style-type: none"> Information is centralized on a single dashboard Gathering past and current business information used for analysis (BI) 	<ul style="list-style-type: none"> Prediction model? Gathering of past, current and anticipated business information for analytical purposes Information is used to predict the probabilities of potential client action(s) (predictive modeling)
CRM governance/Evolution of the CRM solution	<ul style="list-style-type: none"> The solution configuration varies according to the needs of the moment The CRM configurations can be updated by various individuals without specific coordination 	<ul style="list-style-type: none"> The number of people who can make changes becomes limited Ad hoc modifications are limited to being performed by a super user group 	<ul style="list-style-type: none"> Identifying evolution needs Analyzing all needs, considering the already implemented features 	<ul style="list-style-type: none"> The implementation of solutions that meet requirements are evaluated according to long-term repercussions Systematic follow ups based on new features and/or new modules that are being added 	<ul style="list-style-type: none"> CRM user committee with regular meetings to prioritize various development needs Regular follow up on the most valuable components of the company

Are you surprised by the results of your evaluation? Did this reveal clear optimization opportunities? Validate your conclusions by submitting your results in our Web tool: www.xrmvision.com/maturity

Do not hesitate to contact us directly for additional interpretations and recommendations.



ABOUT XRM VISION

Founded in 2008 in Montreal, XRM Vision is a human-sized CRM consulting firm driven by expertise and commitment. We specialize ourselves in **creating** and **implementing** Customer Relationship Management solutions, powered by the Microsoft Dynamics 365 universe.

We provide guidance to sales, marketing and customer service professionals enabling them to unleash the power of the processes and solutions we deliver, all the while focusing all their efforts on crafting an exceptional client experience.

From your customer's journey definition to your full CRM implantation, we'll strive to help you boost your productivity, improve your customer retention and spark your growth.

XRM Vision expertise

We have been involved in hundreds of Dynamics CRM solutions implementations, from sales process and digital marketing automation to client services optimization. We believe that each sales, marketing and customer service professional should only focus on one thing: offering an exceptional customer experience while benefiting from the most efficient and simple technology.

XRM Vision boasts over 100 clients all specializing in different fields such professional services, healthcare, high tech and financial services. Clients such as the Fonds de Solidarité FTQ, World Vision, Raymond Chabot Grant Thornton and Logibec to name a few, are all reaping the benefits of our expertise.



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