



GETTING — SALES & CRM — WORKING TOGETHER



1 Many CRM systems quickly become counterproductive

- Don't force your current sales processes into the CRM
- Take advantage of the best practices designed into the CRM
- Update your processes to align with sales goals and CRM capabilities



2 If it's not in the CRM, it didn't happen

- Sales leadership must enforce and sales teams must agree to use the system as intended
- Avoid multiple systems of record, formal and informal
- Capture everything about the customer in one place for a single source of truth



3 Behavioral changes start at the frontline

- Use the CRM to streamline the sales process
- Use system reporting to make meetings more efficient
- Use reporting to focus on sales improvement and make meetings more effective
- Minimize duplicative efforts



4 Systematically use the CRM to unlock sales productivity

- If used correctly, a CRM system results in increased revenue and productivity
- Constantly review inputs, outputs and approach
- Integrate with marketing automation to drive efficiency

Imaginuity helps customers achieve their sales and marketing goals by utilizing the right strategies and technology solutions necessary for their success.

Contact us today to experience the transformative results that imaginative thinking and innovative technology can deliver for your business.

