



From performing over 75 projects and with over 30 years of experience in the industry, we have seen implementation methodologies come and go. As a result, we have gleaned the best aspects from this background to develop our five-point implementation methodology.

### Our Five-Point Implementation Methodology...

#### Prototype

*Goal: To ensure your CRM Solution can accomplish your workflow requirements.*

Let us look over your workflow requirements, and make sure that the CRM solution you have picked is right for you. We will offer gap analysis on the CRM application chosen to ensure that your choice fits your best interest.

#### Customize Workflow and Convert Data

*Goal: To personalize your CRM Solution to include your data and reconfirm your workflow still meets your needs.*

Now that we have confirmed the CRM solution is the best fit for your requirements, let us apply it to your environment. Every company has their own way of running their business, so we will customize the CRM's workflow to match your company's culture. The key ingredient to help us ensure we are on the right path is to convert your existing data into your new system. Sales presentations can always help you get an idea of how you will utilize the new system, but nothing beats using your everyday examples.

Implementation

#### Develop Interfaces and Optimize Workflow

*Goal: To customize and automate processes that streamlines your workflow*

Once we have your environment-based CRM solution in place, it is now time to streamline the processes. Manual processes are a thing of the past. Today, efficiency determines a company's fate. Whether we customize interfaces or automate processes, something can always be done to make your job a little easier.

#### Reporting

*Goal: To provide you with the means to capture and analyze data, which will mold your company's future.*

In today's market, data mining should be one of the key reasons why any company up-scales to a CRM solution. Typically, one of the most overlooked assets to any company is its existing customer base. \*On average, 80% to 90% of a company's profits are generated by 10% to 20% of its existing customers. Let us make sure you have the reports to accurately determine your customer's needs.

#### Go Live

*Goal: To provide you with a seamless cutover that allows you to make the most of your new tool, headache-free.*

Placing a new system into Production can be nerve-racking, no matter how many systems you may have implemented. However, we ensure a smooth conversion through the Back-end by testing and retesting our conversion processes. On the Front-end, we will assist you in ensuring client rollouts and reporting methods are ready. Most importantly, we will make certain that the users are ready to use the system, through participating in user testing and customized training courses.



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