

Where are you on the CRM Maturity (CRMM) Scale?

Self-Assessment Scorecard

Use this self-assessment to grade your current CRM Maturity level. Use the benchmarks in the guide as a check list to successfully graduate to the next level.

Grade your organisation against each of the areas below and add up your weighted score for each section. This will give you your position on the maturity scale for each level.

A **low score** at any level (6 – 18) indicates that your company could improve before moving to the next level. A **high score** (19 – 30) means your organisation is ready to move to the next level.

Scores

- 1 = Strongly Disagree
- 2 = Disagree
- 3 = Neutral
- 4 = Agree
- 5 = Strongly Agree

CRM Level I

| Features | Score |
|---|-------|
| Contact information is shared and entered in a consistent way across departments | |
| There are no duplicate entries for contact information in our system | |
| We train all our frontline staff how to enter customer profile information when they first start and then on a regular basis | |
| All employees make notes of important conversations and meetings; save emails, faxes, proposals and contracts to customer records for sharing | |
| Our customer information is secure | |
| Customer information is accessible from virtually anywhere | |
| Level 1 TOTAL | |

Scores

- 1 = Strongly Disagree
- 2 = Disagree
- 3 = Neutral
- 4 = Agree
- 5 = Strongly Agree

CRM Level 2

| Features | Score |
|--|-------|
| Our organisation is customer-focused | |
| Our corporate strategy is aligned with being customer-focused | |
| We have cross functional teams that access and share customer knowledge across departments | |
| Tasks to accomplish a specific customer-centric objective are assigned across departments | |
| Our customers do not complain that people in the organisation do not talk with each other, or seem to work at cross purposes on their behalf | |
| From anywhere, I can access a complete picture of customers, contacts, partners and prospects so that I can make informed decisions | |
| Level 2 TOTAL | |

CRM Level 3

| Features | Score |
|--|-------|
| Our system enables us to share and incorporate best practises in sales, marketing, and customer service | |
| We have a well-defined sales process that consists of a number of steps and stages from prospecting through opportunity management to closing the deal | |
| Staff follows guidelines for handling and resolving customer service issues for satisfactory resolution within a specified time period | |
| We can adjust processes and workflow templates to rapidly model our own best practises | |
| We review and update our processes on a regular basis to improve efficiency and customer experiences | |
| Our best practises consistently generate successful outcomes | |
| Level 3 TOTAL | |

Scores

- 1 = Strongly Disagree
- 2 = Disagree
- 3 = Neutral
- 4 = Agree
- 5 = Strongly Agree

CRM Level 4

| Features | Score |
|---|-------|
| Our organisation has measurable performance indicators for sales, marketing, and service by which we monitor achievement toward goals | |
| Executives define and have access to real-time KPIs and forecasting information | |
| Managers can define and access real-time KPIs to monitor daily business operations | |
| Managers are alerted in real-time about critical situations, in order to remedy them immediately | |
| Staff members are alerted in real-time about critical situations with their customers | |
| | |
| Level 4 TOTAL | |

If you rated 6 – 18 on any of the levels:

- Focus on improving your processes at that level before progressing to the next level. Working through the levels in progression will ensure success.
- Understand whether all the items of the level pertain to your business or not. Some processes may not apply to your unique business.

If you rated 19 – 30 on any of the levels:

- You are ready to move up a notch to the next level.
- Create a plan for achieving the incremental improvements of the next level.
- Within the achievement areas for each level, prioritise what's most important to your business. Identify areas where you'll see the biggest impact for your customers, productivity, and revenues.
- Involve key stakeholders — executives, departmental managers, and staff — in defining how to achieve success for each item.

Congratulations!

You are on your way to realizing the benefits of being a CRM Level 4:

- clear executive insight
- greater staff productivity — and ultimately
- greater customer satisfaction and loyalty that drives increased revenues