

Is Your CRM Holding You Back?

Your CRM system is the backbone of your customer interactions. But is it functioning at its peak potential?

Our comprehensive CRM health check can help you identify areas for improvement and ensure your CRM is functioning at its peak potential to support your sales, marketing, and customer service activities.



CRM HEALTH CHECK WILL HELP YOU ANSWER THE FOLLOWING QUESTIONS:

- Is your CRM outdated or unscalable?
- Are you utilising the full potential of your CRM?
- Do you have the information you need to make informed decisions about your customers?
- Does your CRM system adhere to relevant compliance regulations?

HOW WE HELP YOU FINE-TUNE YOUR SYSTEM?

- 1. CRM Assessment:** Evaluate the CRM's functionality and performance, analysing data to identify potential issues or areas for improvement.
- 2. Define Requirements:** Determine necessary modifications to enhance CRM functionality, reliability, and security based on assessment results.
- 3. Implement Changes:** Update the CRM to optimise performance through process enhancements and modifications.
- 4. Reporting:** Provide a detailed CRM health check report with best-practice guidance, recommendations for improvement, and highlights of new CRM functionality.

BENEFITS OF DOGMA'S CRM HEALTH CHECK



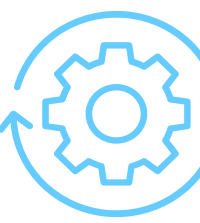
Clean Data, Clear Decisions:

Make informed choices based on accurate, reliable customer data.



Actionable Insights:

Gain valuable intel on customer behaviour, sales trends, and marketing effectiveness.



Smooth Operations:

Eliminate performance bottlenecks for a seamless CRM experience.



Compliant System:

Ensure your CRM adheres to industry data security standards.



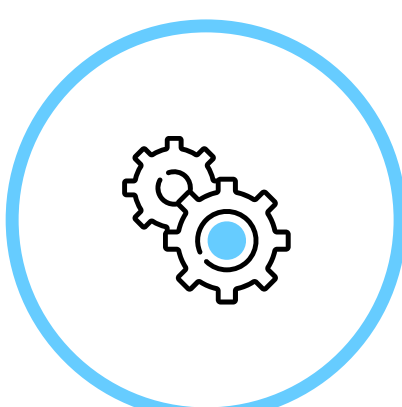
Improved Sales, Marketing, & Customer Service Performance:

Drive growth with a well-functioning CRM and actionable insights.

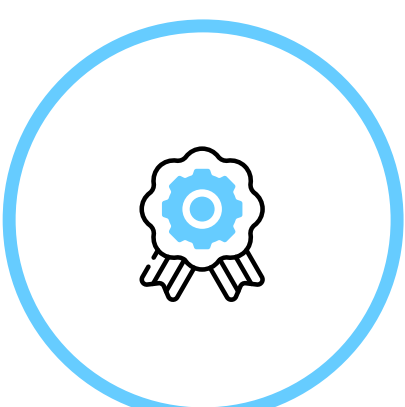
DOGMA'S DEEP CRM HEALTH CHECK

At Dogma, we provide a thorough **50-point health check** to identify potential issues that may impact your system's performance.

Our assessment covers technical, configuration, solution design, user setup, and integration aspects, enabling us to provide an accurate diagnosis of your system. Below are some of the key elements addressed in our system health check report.



System overview



Standard objects



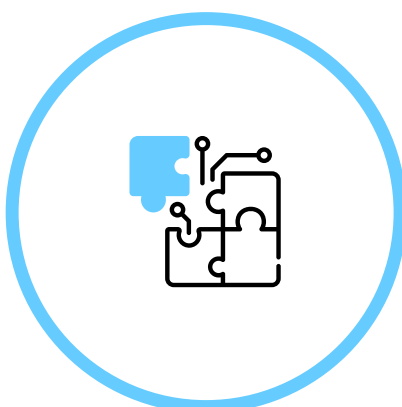
Custom objects



Reports



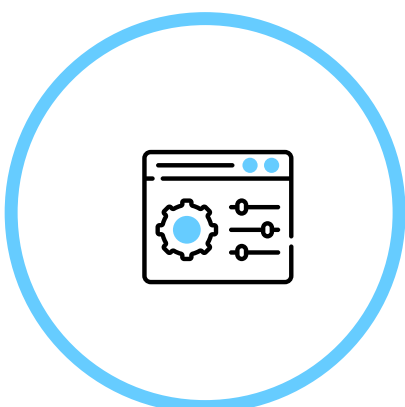
Mobile app usage



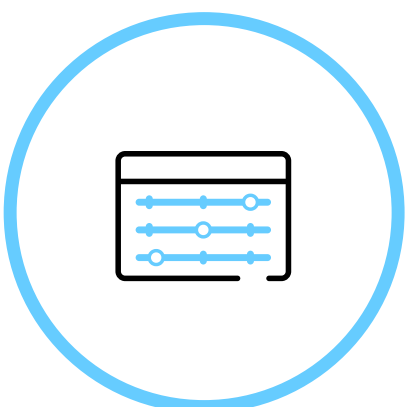
Integrations



Business settings,
(product catalogue, service management, email templates, duplicate detection rules)



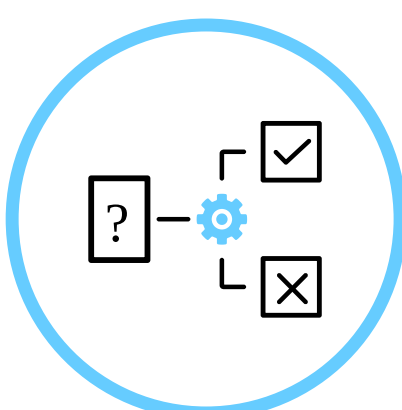
System settings,
(users & roles, email configuration, audit logs)



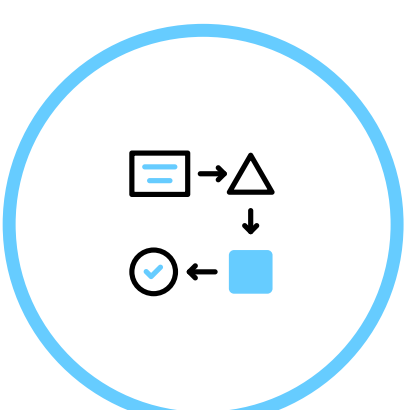
Customisation & configuration



Instances



Calculated and rollup fields



Workflows



Best practice recommendations

Don't let a hidden roadblock hold you back. Optimise your CRM today!

Dogma's expert CRM Health Check can **boost** your sales, marketing, and customer service performance, **increase** user adoption, and **optimise** data for clear insights. Schedule your CRM Health Check today!

ABOUT DOGMA

The Dogma Group is a progressive digital transformation company committed to delivering the digital imperative and becoming the most trusted advisor to its clientele.

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