

# Your Business CRM Preparation & Discovery Options

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Detailed scoping and careful planning give you a solid foundation for bringing the right CRM into your business, and getting results from it. The key is to follow a process that makes sure you won't overlook anything important.

Our objective and informative discovery sessions are an ideal way to follow that process and kick start your CRM strategy or project.

## We'll give you the knowledge to:

- Assess the role for CRM in your business
- Scope out your business requirements
- Select the right software and partner for your business
- Get your key stakeholders involved and bought in from the start

## Thinking ahead?

[Join our 8 Step CRM Knowledge Webinar Series](#) for an online exploration of each of the topics that will make your CRM research easier and more informed. Giving you a helicopter view of CRM capabilities we'll go on to explore available solutions, the CRM scoping process and the creation of a business case.

## On a deadline?

We can come to you and facilitate complementary\* discovery sessions that will help you fully prepare for the next steps on your journey. We'll follow up with a progression pack that will detail what we discussed and the opportunities for CRM to make a tangible difference in your business.

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<p><b>Option 1</b></p> <p><b>Initial CRM scoping session (1/2 day)</b></p> <p>Helping you to define your key priorities, objectives and opportunities alongside your key stakeholders.</p>	<p><b>Option 2</b></p> <p><b>Key focus session (1/2 day)</b></p> <p>Like the look of our 8 webinar topics in our series but need just one or two of them worked through in depth? This session can take up to 3 of these topics and we'll work them through with you.</p>
<p><b>Option 3</b></p> <p><b>CRM Implementation tailored to your business (1 day)</b></p> <p>We'll work through the full webinar series in person and tailored to your business ensuring you have the finest detail to help with your project planning.</p>	<p><b>Option 4</b></p> <p><b>Custom discovery session (1/2 day or 1 day)</b></p> <p>Know you need some support but not quite sure which one of the options will help? Talk to us and we'll be happy to have an informal discussion about your requirements.</p>

## Still not sure?

Our consultants will happily chat you through these options and establish the right starting point for you. Just give us a call on 0845 226 8170 or drop us an email at [info@redspire.co.uk](mailto:info@redspire.co.uk) to kick things off.

\* Our sessions are free for those that qualify. Call one of our consultants to discuss your requirements in more detail.