Reporting Customization and Implementation

Ask yourself the following:

- Does our reporting software go beyond merely creating visibility into sales activities and the pipeline and it is truly the competitive weapon we had hoped for when we planned our implementation?
- Is our CRM truly helping the sales force to do what they do best – SELL?
- Have we equipped our team with a clearly defined, well-documented sales process?
- Did we state all the primary goals of the system in clear concise language with specifics, including how many new customers will be gained?
- Did we plan and capture all of our current metrics before we went to implementation?
- Have we defined exactly what costs will be included and what return metric will be utilized, beyond simple CRM pricing?
- Was our reporting CRM implementation started by one or more senior executives?

The SalesForce Reporting solution is designed to help your organization develop and utilize the most effective method to track and manage customer interactions and sales activity.

The objectives of a proper reporting system must consider a company's specific situation and its customers' needs and expectations. Our solution will:

- Identify and track the 10-20 most meaningful marketing, sales and service metrics that drive the business
- Equip your team with a clearly defined, well-documented sales process
- Create custom real-time reports, dashboards and alerts that give you one button access to the numbers you need to better forecast and deliver on your targets
- Support the development of marketing strategy by developing the organization's knowledge in areas such as identifying customer segments, improving customer retention, improving product offerings (by better understanding customer needs), and by identifying the organization's most profitable customers

The most important thing to remember is that the buy in for the sales force is huge and should not be overlooked when selecting an implementation partner for your business.