

CRM Analysis and Optimization

1. Where you stand today

You are using your Customer Relationship Management System better than good. There are hardly any, or no defined CRM processes and your team maintains the data sporadically. You are sure that a lot of customer information does not even make it into your CRM system, but is lost due to different processes and systems in your organization.

2. Where you want to go

Your picture of the future is different. You want to have orderly processes, well-maintained data, and thus be able to forecast what your future sales and customers will look like. You want to measurably increase sales, especially in the area of up-sells and cross-sells. You want to get more leverage on the return on investment of your sales department. You want to lower the cost of acquisition (CAC) of new customers and increase the customer lifetime value of existing customers.

3. Our proven process

- We analyze your existing CRM processes for weaknesses, low hanging fruits and bottlenecks.
- We analyze your CRM data on contact, company and opportunity level.
- From both parts we develop recommendations for your team for processes and data management.

4. How long it will take

The process takes 3 months. Afterwards optimization and support.

5. What we need from you

We need top-down commitment from you to avoid building paper tigers.

We need a single point of contact within the company (e.g. Managing Director, Chief Customer Officer, Head of Marketing, Head of Sales).

6. What it costs

From 2.500€ per month.

7. Frequently asked questions

- Compliance, what about our customer data?
→ To initiate our customer relationship already we sign a confidentiality agreement. We work according to the data protection standards of the GDPR.
- Is CRM analysis and optimization a product or a service?
→ It is a service that partly relies on software.
- What is the cooperation with tractionwise like?
→ Very straightforward. We ask you some essential questions at the beginning to quickly dive into your market. You will receive monthly reports on the state of affairs and knowledge.

Company - tractionwise is a customer insights company with the necessary consulting skills for inspiring customer relationships.

Rooted in Bavaria, at home in the world.



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