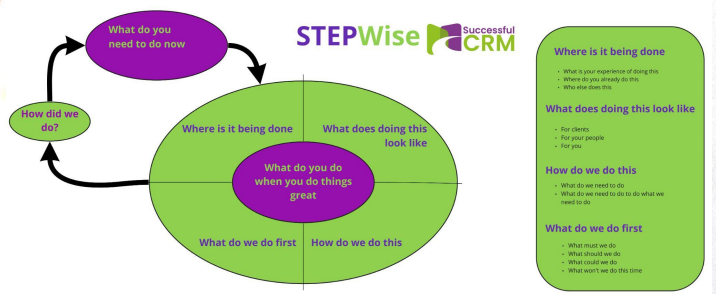




Keeping CRM Simple





STEPWise Diagram.

What do you do well?

Principle: It is much easier to be successful doing what you are good at than to try to be better at what you are bad at.

We help you to think about and analyze what you are like when things go as well as they can so that you can start to build a picture of what you do to make this happen - what you do well. This can then identify what you can do more of, to deliver what it is you need to do.

Doing more of what you do well now will help you to do what you do best all the time and define what you are about as a business.

What do you need to do?

Principle: If you haven't got an urgent and immediate reason for taking on a CRM System you are unlikely to be successful

What clear measurable (SMART) benefits will you get from introducing a CRM system that will make your investment in time and money worthwhile (preferably four)? Why is it important that you get these benefits now?

From asking these questions, we develop a benefits statement that can be used to track progress.

Where is this being done?

Principle: If what you need to do has already been done, you will have a clearer idea of how you will succeed at doing it

The easiest benefits to deliver are those that come from you or your people doing more of what you do when you are at your best because these are aligned with what you are about as a business. Less easy are those that are aspirational and mean you have to change what you are about.

So we discover from you and your people, experiences that are relevant to delivering the benefits you want to see.

What does doing this look like?

Principle: If you can imagine what CRM success looks like you can make it happen

How do we do this?

Principle:

How can the functionality within the standard CRM deliver the future that you imagine with as little

What do we do first?

Principle: Plan to deliver the greatest benefit with the least complexity and effort first

The easiest and least complex step is to use the existing functionality of the CRM to deliver as much of what you imagine in the minimum time - no more than four weeks. That means confirming

- What must be delivered in this step without which it wouldn't be worth doing
- What should be delivered unless you agree otherwise
- What could be delivered if there is enough time within the four weeks
- What won't be delivered this time but will be next time.

We agree on this first step with you and the measurable benefits that we will deliver

How did we do?

STEPWise process

These four days are offered at a preferential rate (our normal daily rate is £480) of £888. That is because we see this as the start of an ongoing relationship with you. However, we do ask that these four days are used, and the step delivered within four weeks.

In that time, we will cover:

- Agreeing terms of engagement
- Design of your system
- Implementation and
- Go live

Remember this is the first step and launch pad, for what is a journey. With the returns you will make this will also provide the seed funds to self-fund the development of a CRM solution, which will always be relevant and deliver what you need.

To organise this first and subsequent steps so that we always deliver on budget on time and at a high quality, we follow the MoSCoW principle and agree with you:

- What Must be delivered – without which the step would not be worth taking
- What Should be delivered – any changes in which will be agreed with you
- What Could be delivered – which are features that could be delivered if we can
- What won't be delivered this time – but will be in future steps.

To confirm that the step has been delivered these need to be defined as SMART targets that are specific, measurable, achievable, realistic, and timed (delivered in four days of effort).



Design of your CRM

To design your CRM, we generally carry out process mapping using GetSkore, so that we can understand what job it needs to do. You may have already developed a diagram to show these steps, and we interpret this so that we can understand the logic behind each of them – why do you do this to achieve what end.

From this we create a plan on paper first (Entity Relationship Diagram) which shows all the records that you will use and how they need to fit together. Normally this is predefined as there are standard ways that Leads, Contacts, Accounts and Sales Opportunities work. You could, of course, want to call these records different things.

This plan will also explain how any of the process can be automated through workflow, especially where the value you are seeking, is to save time and cut down on automation.

During this process we will also define and agree with you a data dictionary, which lists all the fields you will need, to make the CRM work in the way envisaged. This includes what you want to keep in these fields and what that means.

One of the outcomes of this process, will be to audit the data you currently have in the system you are using at the moment. It could also mean providing you with a data migration spreadsheet for you to complete. (Where you are already using ZOHO CRM and the project is to upgrade it to a more usable tool, you may not need to migrate data.)

Implementing your CRM

Once you have approved the design of the CRM and are clear about the way it will deliver the value expected, we will configure the system.

Once this has been completed, we will test it internally, and start to create the necessary systems documentation. That is important because it safeguards your CRM for the future and is a reference for training new users and future development.

When we have fully tested the CRM we will then “deliver” it back to you

Getting live fast

Once the CRM is available for use, we will create training notes tailored to the way that your system is supposed to work, and use these to run a training workshop.

(These notes can then be used and if necessarily updated for future users of the system, and to support their onboarding.)

Where appropriate, we also provide go live support for a week, so that we can capture any issues e.g., workflow not working in the way intended, or unforeseen differences in the live environment. To do this we are available at short notice to cover any issues that you may find.

Keep delivering

We offer a number of support packages to keep your CRM system creating value post delivery.

- ad hoc support when you need it
- prepurchase of service credits at discounted hourly rates
- support contracts – (think AA or RAC)
- full CRM Administrator

As a Fast to Live client, you are entitled to the Service Credit Five package which is worth £250. This gives you up to five hours further work within the next six months.

You are also eligible to join our ZOHO Users community (Successful Business) which includes regular updates on developments in CRM, a monthly newsletter and regular user meetups where you can get advice from both me and other ZOHO users.

Case Study – DB Wealth planning and Preservation.

Introduction:

DB Wealth Planning and Preservation has two separate divisions. One of them is focused on preserving your wealth, such as pensions, mortgages, wills and trusts etc. The other is in the less regulated environment of wealth planning, which makes work optional. Doug is an expert in this area, an international speaker and author of "Goals can come true".

My main contact throughout was with Steve Ody, the practice manager, who was brought in by Doug to streamline the operation and grow the wealth planning side of the business.

The problem:

The key issue Steve had to address, was the paper driven nature of the business, some of which is a requirement of regulation, but a lot of which wasn't. That included multiple spread sheets and paper records, that take time to complete and update, meaning that it is easy for them to become out of date.

Doug and Steve were determined to find a system that could automate the practice as far as possible, while ensuring regulatory processes were followed and professionalism as well as a personal touch was maintained. As they had revamped the wealth planning side of the business and launched a new web site, that seemed like a good starting point.

The solution:

Steve was referred to me through Growth by Design who had already gone through the Fast to Live process and liked the approach. After understanding what was involved and mapping the processes using GetSkore, we agreed a solution which included using the CRM to automate the internal processes, and ZOH Survey, to get the clients themselves to update their own records.

Once we had agreed this structure, I configured the system for Steve and created the initial Surveys, along with an automated drip campaign of emails, for those expressing interest in wealth planning. We also configured the CRM to follow the regulated processes in the preservation areas of the business. The whole thing was then integrated with DB wealth planning and preservations web site.

What Steve said

"Nick has often gone way beyond the extra mile to make sure that we had a system that meets our needs. We always felt he was very much one of the team and was as interested in our business and success as we are. I would have no hesitation in recommending his service to implement CRM systems, and then support them long term."

Business Terms

These business terms are comprehensive, but we believe that they cover all the usual things in legalise. If there are any terms that you want to vary, please let us know as we would prefer a close relationship as friends.

1. INTERPRETATION

1. **Definitions.** In these Conditions, the following definitions apply:

Conditions: these terms and conditions as amended from time to time in accordance with clause 2.6.

Contract: the contract between the Service Provider and the Client for the supply of Services in accordance with these Conditions.

Client: the person or firm who purchases the Services from the Service Provider.

Deliverables: all documents, products and materials developed by the Service Provider or its agents, subcontractors and personnel as part of or in relation to the Services in any form, including but not limited to training materials.

Fees: The Fees payable by the Client for the supply of the Services in accordance with clause 5.

Intellectual Property Rights: patents, rights to inventions, copyright and related rights, trade marks, business names and domain names, rights in get-up, goodwill and the right to sue for passing off, rights in designs, database rights, rights to use, and protect the confidentiality of, confidential information (including know-how), and all other intellectual property rights, in each case whether registered or unregistered and including all applications and rights to apply for and be granted, renewals or extensions of, and rights to claim priority from, such rights and all similar or equivalent rights or forms of protection which subsist or will subsist now or in the future in any part of the world.

Premises: The Client's premises or premises used by the Service Provider for provision of Services from time to time.

Service Provider: Successful CRM - Company No. 08871167.

Site: The Service Provider's site at www.successfulcrm.co.uk

Workshop: a workshop or presentation at the premises of the client or such other premises as arranged by the Service Provider.

2. **Construction.** In these Conditions, the following rules apply:
 - a. A **person** includes a natural person, corporate or unincorporated body (whether or not having separate legal personality);
 - b. A reference to a party includes its personal representatives, successors or permitted assigns;
 - c. A reference to a statute or statutory provision is a reference to such statute or provision as amended or re-enacted. A reference to a statute or statutory provision includes any subordinate legislation made under that statute or statutory provision, as amended or re-enacted;
 - d. Any phrase introduced by the terms **including, include, in particular** or any similar expression shall be construed as illustrative and shall not limit the sense of the words preceding those terms; and
 - e. A reference to **writing** or **written** includes faxes and emails.

2. **SERVICES AND BASIS OF CONTRACT**
 1. Services for Clients include the following discrete services:
 - a. sourcing and advice in respect of third party Customer Relationship Management software (**CRM**) and procuring the CRM though the Client will at all times enter into and have its own contract with the third party CRM provider;
 - b. implementation of the Client's chosen CRM software including the inputting of the Client's information into the CRM as described in schedule 1;
 - c. Offer of additional services which are specifically not included in the Fast to Live Plan
 - d. Offer of further development which are not included in the Fast to Live Plan at the prices shown.
 2. The Client and Service Provider shall specify the Terms of Engagement for the Fast to Live Plan (the **Request**). The Request for Services constitutes an offer by the Client to purchase Services in accordance with these Conditions.
 3. The Request shall only be deemed to be accepted when the Service Provider issues written acceptance of the Request (the **Confirmation**), which shall include the provision of the required Services, commencement date, pricing and timescales, at which point the Contract shall come into existence.
 4. The Contract, being formed of the Confirmation and these Conditions, constitutes the entire agreement between the parties. The Client acknowledges that it has not relied on any statement, promise, representation, assurance or warranty made or given by or on behalf of the Service Provider which is not set out in the Contract.
 5. These Conditions apply to the Contract to the exclusion of any other terms that the Client seeks to impose or incorporate, or which are implied by trade, custom, practice or course of dealing.
 6. These Conditions may change from time to time and such changes shall be notified on the Site.

3. **SUPPLY OF SERVICES**
 1. The Service Provider shall supply the Services to the Client in accordance with the Contract in all material respects.
 2. The Service Provider shall use all reasonable endeavours to meet any performance dates but any such dates shall be estimates only and time shall not be of the essence for performance of the Services.
 3. The Service Provider shall be available for Services between the hours of 8.30am and 5.30pm.
 4. The Service Provider shall have the right to make any changes to the Services which are necessary to comply with any applicable law or safety requirement, or which do not materially affect the nature or quality of the Services, and the Service Provider shall notify the Client in any such event.

5. The Service Provider warrants to the Client that the Services will be provided using reasonable care and skill.

4. CLIENT OBLIGATIONS

1. The Client shall:
 - a. ensure that any information provided to the Service Provider is complete and accurate including full disclosure of all relevant issues;
 - b. co-operate with the Service Provider in all matters relating to the Services;
 - c. provide the Service Provider with such information, and access to such Premises and equipment as where relevant, as the Service Provider may reasonably require in order to supply the Services, and ensure that such information is accurate in all material respects;
2. If the performance of the Service Provider of any of its obligations under the Contract is prevented or delayed by any act or omission by the Client or failure by the Client to perform any relevant obligation (**Client Default**):
 - a. the Service Provider shall without limiting its other rights or remedies have the right to suspend performance of the Services until the Client remedies the Client Default, and to rely on the Client Default to relieve it from the performance of any of its obligations to the extent the Client Default prevents or delays the performance of the Service Provider of any of its obligations;
 - b. the Service Provider shall not be liable for any costs or losses sustained or incurred by the Client arising directly or indirectly from the failure or delay of the Service Provider to perform any of its obligations as set out in this clause 4.2; and
 - c. the Client shall reimburse the Service Provider on written demand for any costs or losses sustained or incurred by the Service Provider arising directly or indirectly from the Client Default.

5. FEES AND PAYMENT

1. The Fees for the Services shall be calculated in accordance with the Services required by the Client and shall be set out in the Services Provider's Confirmation.
2. Invoices are payable 14 days after presentation.
3. The Service Provider will require a non-refundable deposit which must be remitted prior to the commencement of the Services (**Deposit**).
4. The Services offered and Fees may change from time to time and any changes shall be reflected on the Service Provider's Site and, if such a change occurs during the term of this Contract, the Client shall be notified of any changes in the Fees in writing.
5. The Client shall pay all amounts due under the Contract in full without any set-off, counterclaim, deduction or withholding (except for any deduction or withholding required by law). The Service Provider may at any time, without limiting its other rights or remedies, set off any amount owing to it by the Client against any amount payable by the Service Provider to the Client.

6. INTELLECTUAL PROPERTY RIGHTS

1. All Intellectual Property Rights in or arising out of or in connection with the Services shall be owned by the Service Provider.

7. INSURANCE

The Service Provider shall maintain in force, with a reputable insurance company, such insurance policies as to cover the liabilities that may arise under or in connection with the Services.

8. CONFIDENTIALITY

A party (**Receiving Party**) shall keep in strict confidence all technical or commercial know-how, health records, processes or initiatives which are of a confidential nature and have been disclosed to the Receiving Party by the other party (**Disclosing Party**). The Receiving Party may also disclose such of the Disclosing Party's confidential information as is required to be disclosed by law, any governmental or regulatory authority or by a court of competent jurisdiction. This clause 8 shall survive termination of the Contract.

9. LIMITATION OF LIABILITY

The Service Provider provides Services to business Clients in the course of their business only.

1. The Service Provider shall under no circumstances whatever be liable to the Client for any issues relating to a previous CRM, its IT systems or a failure of the CRM, the third party provider shall at all time remain liable for the performance of the CRM.
2. The Client alone shall be responsible for its compliance with data protection and confidentiality obligations in relation to the information held in the CRM.
3. The Service Provider shall under no circumstances whatever be liable to the Client, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, for any loss of profit, or any indirect or consequential loss arising under or in connection with the Contract.
4. The total liability of the Service Provider to the Client in respect of all other losses arising under or in connection with the Contract, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, shall in no circumstances exceed the Contract amount.
5. The terms implied by sections 3 to 5 of the Supply of Goods and Services Act 1982 are, to the fullest extent permitted by law, excluded from the Contract.
6. This clause 9 shall survive termination of the Contract.

10. CANCELLATION AND REFUNDS

1. A Client in a Minimum Period Contract must pay the balance of the Fee if it wishes to cancel the Services before the end of the Minimum Period.
2. The Client may cancel a one off Service no less than 48 hours in advance and receive a full refund subject to clause 10.3 below.

3. Where Services have been Confirmed but have not yet commenced, and the Service Provider has incurred costs in preparing to provide the Services, the Client shall be liable for those costs.
4. Where a Deposit has been requested, it shall not be refunded in any circumstances.

11. TERMINATION

1. Subject to clause 10, where Services are provided on an ongoing basis as opposed to a one off basis, then without limiting its other rights or remedies, either party may terminate the Contract by giving the other party 4 weeks' written notice.
2. Without limiting its other rights or remedies, either party may terminate the Contract with immediate effect by giving written notice to the other party if:
 - a. the other party commits a material breach of any term of the Contract and (if such a breach is remediable) fails to remedy that breach within 7 days of receipt of notice in writing to do so;
 - b. the other party appears to be insolvent or undergoes an insolvency event.
3. Without limiting its other rights or remedies, the Service Provider may suspend or terminate the Contract with immediate effect by giving written notice to the Client if the Client fails to pay any amount due under this Contract on the due date for payment and fails to pay all outstanding amounts within 7 days after being notified in writing to do so.

12. CONSEQUENCES OF TERMINATION

On termination of the Contract for any reason:

- a. the Client shall immediately pay to the Service Provider all outstanding invoices and, in respect of Services supplied but for which no invoice has been submitted, the Service Provider shall submit an invoice, which shall be payable by the Client immediately on receipt;
- b. the Client shall return any Deliverables which have not been fully paid for;
- c. the accrued rights, remedies, obligations and liabilities of the parties as at expiry or termination shall be unaffected, including the right to claim damages in respect of any breach of the Contract which existed at or before the date of termination or expiry; and
- d. clauses which expressly or by implication survive termination shall continue in full force and effect.

13. FORCE MAJEURE

1. For the purposes of this Contract, **Force Majeure Event** means an event beyond the reasonable control of the Service Provider including but not limited to strikes, lock-outs or other industrial disputes (whether involving the workforce of the Service Provider or any other party), failure of a utility service or transport network, act of God, war, riot, civil commotion, malicious damage, compliance with any law or governmental order, rule, regulation or direction, accident, breakdown of plant or machinery, fire, flood, storm or default of Service Providers or subcontractors.
2. The Service Provider shall not be liable to the Client as a result of any delay or failure to perform its obligations under this Contract as a result of a Force Majeure Event.
3. If the Force Majeure Event prevents the Service Provider from providing any of the Services for more than 4 weeks, the Service Provider shall, without limiting its other rights or remedies, have the right to terminate this Contract immediately by giving written notice to the Client.

14. DISPUTES

1. If any dispute arises in connection with this agreement, the parties will attempt to settle it by mediation in accordance with the Centre for Effective Dispute Resolution (**CEDR**) Model Mediation Procedure. Unless otherwise agreed between the parties within 14 days of notice of the dispute, the mediator will be nominated by CEDR. To initiate the mediation a party must give notice in writing (**ADR notice**) to the other party to the dispute requesting a mediation. A copy of the request should be sent to CEDR.
2. The mediation will start not later than 28 days after the date of the ADR notice. The commencement of a mediation will not prevent the parties commencing or continuing court proceedings.

15. GENERAL

1. **Assignment and other dealings.** The Contract is personal to the parties and shall not be assigned, transferred or otherwise dealt with without the written consent of the other party which shall not be unreasonably withheld.
2. **Notices.** Any notice or communication under this Contract shall be by email unless the Client has indicated an alternative preference prior to receiving the Confirmation and it shall be the Client's responsibility to ensure that the Service Provider has up to date contact details. Notice sent by email shall be deemed to be received at gam the following business day. This does not apply to legal proceedings.
3. **Severance.** Each of the paragraphs of these Terms operates separately. If any court or relevant authority decides that any of them are unlawful or unenforceable, the remaining paragraphs will remain in full force and effect
4. **Waiver.** A waiver of any right or remedy under the Contract or law is only effective if given in writing and shall not be deemed a waiver of any subsequent breach or default. No failure or delay by a party to exercise any right or remedy provided under the Contract or by law shall constitute a waiver of that or any other right or remedy, nor shall it prevent or restrict the further exercise of that or any other right or remedy. No single or partial exercise of such right or remedy shall prevent or restrict the further exercise of that or any other right or remedy.
5. **No partnership or agency.** Nothing in the Contract is intended to, or shall be deemed to, establish any partnership or joint venture between the parties, nor constitute either party the agent of the other for any purpose. Neither party shall have authority to act as agent for, or to bind, the other party in any way.
6. **Third party rights.** A person who is not a party to the Contract shall not have any rights to enforce its terms.
7. **Variation.** Except as set out in these Conditions, no variation of the Contract, including the introduction of any additional terms and conditions, shall be effective unless it is in writing and signed by the Service Provider.
8. **Governing law.** The Contract, and any dispute or claim arising out of or in connection with it or its subject matter or formation (including non-contractual disputes or claims), shall be governed by, and construed in accordance with the law of England and Wales.
9. **Jurisdiction.** Each party irrevocably agrees that the courts of England and Wales shall have exclusive jurisdiction to settle any dispute or claim

arising out of or in connection with this Contract or its subject matter or formation (including non-contractual disputes or claims).

Description of Service

Schedule 1: Fast to Live

The following services are included in the Fast to Live Plan which will be provided at £880 for one CRM System which is estimated at 4 days efforts comprising the following elements

Terms of Engagement

The agreed terms of engagement for this Fast to Live service are as follows:

Must be delivered for approval:

Should be delivered – any change will be agreed:

Could be delivered:

Once agreed 50% of the fee £440 will become payable.

Design :

In this session we will create a Process Mapping diagram in GetSkore which will deliver the agreed terms of reference from which we create an Entity Relationship Diagram that describes the records of the system and how they relate to each other.

We will create a data dictionary to describe the fields in each record, their format and what they should contain.

Where necessary we will also include details of any workflows developed

Implementation

Once the design of your system is approved by yourselves, we will configure the CRM System accordingly and test it to ensure that it works. When we are satisfied that it does work as intended, we will deliver it to you.

Go Live

We will provide a training session and notes to familiarise you with the system and initial go live support for a week as you roll the system out.

Approval

When you have used the system for a week, we will arrange a sign off meeting at which you will approve the work done or specify and agree any remedial work required. Assuming approval is agreed you will complete the agreed payment