



CRM ROADMAP SERVICE

At LexisNexis®, our InterAction® services consultants have one primary goal – to help ensure that your InterAction® deployment is a success. With over 400 InterAction customers worldwide, we understand the importance of a clear, shared vision for a successful CRM implementation. Deploying an enterprise solution like InterAction requires more than software installation and change management.

To achieve true return on investment from CRM, a firm needs clearly defined strategic goals and a well-crafted strategy for how it wants to interact with and be perceived by its customers, prospects and other key contacts. By developing a comprehensive plan, you will have the information you need to allocate the appropriate resources to obtain the desired CRM results. It can also help you keep efforts focused on your top priorities, identify goals that aren't being met, and devise new tactics to achieve those goals.

CRM ROADMAP: THE PATH TO CRM SUCCESS

CRM is a strategy that is enabled by process, technology, data and people. With access to information to make better decisions, firms can attract new clients while retaining existing ones, increase revenue, and decrease inefficiencies. To be successful, businesses need to build their CRM strategy around these goals in order to support growth and profitability. Additional keys to achieving CRM goals include securing executive leadership, accommodating the firm's culture in the strategic plan, change management, performance metrics and best practices for ongoing data quality. Businesses that view their deployment as an ongoing process with continued involvement, will realize the true benefits that CRM can provide.

At LexisNexis, our InterAction services consultants understand the path to CRM success. Listening to and understanding the needs of our clients is paramount to providing solutions that work. By leveraging the extensive design, process and technical expertise of our Consulting Services team, you can attain desired CRM results.

A CRM Roadmap engagement is designed to provide the guidance and information you need to implement and deploy InterAction throughout the firm. Our consultants work directly with your planning team to achieve the following:

- *A definition of CRM goals the firm would like to achieve and the activities that will allow the firm to achieve those goals*
- *A review of the defined goals and activities with your firm's professionals to validate and prioritize these goals*
- *A comprehensive plan for implementing the activities, including processes, technology and people that are needed to execute the plan*

The CRM Roadmap service includes a summary of the high-level InterAction requirements needed to support the strategy, which will ultimately save your firm time and money and help avoid potential roadblocks to success. The CRM Roadmap service enables you to validate technology decisions moving forward and ensure these decisions are tightly aligned with your overall business strategy.

The final deliverable is a report that outlines specific action items including timing, resources, communication, training and incentives. The CRM Roadmap service can be delivered in 15-20 days. For more information on this strategic consulting service or any other offerings from our InterAction Consulting Services team, please contact us at 888.572.1400 or professionalservices@interaction.com.