

## Digital Transformation Process For A CRM (Customer Relationship Management)

system, tailored for businesses modernising customer interactions, sales, and support workflows:

**Product:** AI driven Adaptive Sales management platform for any sales driven businesses

### Define the Vision & Business Goals

#### ☑ Clarify Objectives

- Improve customer acquisition & retention
- Streamline sales pipeline
- Enable personalised engagement
- Unify customer data across channels

#### ☑ Stakeholder Involvement

Involve Sales, Marketing, Support, and Internal IT Team

### Deployed the Right CRM Platform

#### ☑ Cloud-Based

Choose platforms as Custom SAAS Product

#### ☑ Scalability & Integration

Ensure compatibility with ERP, email, social, website, and mobile apps

#### ☑ Customisation & Automation Capabilities

Considered low-code/no-code workflow processes



### Audit Existing CRM Capabilities

#### ☑ Gap Analysis

Review legacy CRM tools (e.g., spreadsheets and internal software)

#### ☑ Data Mapping

Identify fragmented data sources, inconsistencies, and ownership

#### ☑ Evaluate User Adoption

Check pain points for sales reps, marketers, and customer agents

### Data Migration & Unification

#### ☑ Cleanse Customer Data

Remove duplicates, validate emails/phones, normalise fields

#### ☑ Merge Disparate Systems

Integrate old databases, Excel sheets and imported data from third-party apps

#### ☑ Set Master Data Model

Ensure consistency across departments

## Automate and Personalise Workflows

- ✓ **Lead & Opportunity Management**  
Automate lead scoring, assignments, and reminders
- ✓ **Sales Automation**  
Streamline follow-ups, quote generation, and order generation
- ✓ **Marketing Automation**  
Drip campaigns, behavior-based email triggers, CRM-integrated newsletters
- ✓ **Customer Support**  
Auto-create tickets from emails, assign priorities intelligently

## Multi-Channel Customer Engagement

- ✓ **Omnichannel Integration**  
Integrated email, WhatsApp and social media
- ✓ **Self-Service Portals**  
Let customers view order status and raise tickets
- ✓ **Chatbots & Conversational AI**  
First-line query handling and lead qualification

## Training, Change Management & Adoption

- ✓ **User Training Programs**  
Hands-on training, quick guides
- ✓ **Internal Champions**  
Nominate power users to drive adoption
- ✓ **Feedback Mechanisms (Manual)**  
Continuous loops to improve usability and workflows

## Add-ons done :

- ✓ **Mobile CRM App** for field sales
- ✓ **Gamification** to motivate sales teams



## Enable AI & Analytics

- ✓ **Customer 360° View**  
Combine purchase history, support touchpoints
- ✓ **Predictive Sales Insights**  
Use AI to suggest high-likelihood conversions
- ✓ **Churn Analysis**  
Flag at-risk customers and suggested proactive engagement

## Governance, Security & Compliance

- ✓ **Access Control & Data Privacy**  
Implement role-based access, encryption, and privacy policies
- ✓ **Audit Trails**  
Track every modification in customer records

## Continuous Optimisation

- ✓ **KPI Dashboards**  
Revenue, pipeline health, lead conversion, response time
- ✓ **Customer Feedback Analysis**  
Used real data to evolve CRM interactions