



Customer

relationship

health check

### Insight into your most important relationships

An organization is only as healthy as its customer relationships. Happy, satisfied customers lead to repeat business and referrals. Unhappy customers create churn and reputation risk. And high demand customers might be costing you more than their business is worth.

A health check is about monitoring customer relationships to ensure they're both vibrant and profitable. The more you know about what makes a healthy customer relationship, the better decisions you can make to secure and retain the best customer accounts.

Understand how your business retains and develops profitable customers.

### Getting more from your CRM

The essential customer information you need is probably already available right inside your CRM. But if you're not getting the right data, or your CRM isn't being used the way it was intended, you're missing out on all kinds of valuable customer intelligence.

### When is it time for a health check?

- You "don't know what you don't know" about your customers
- You are considering a new CRM
- Your CRM was implemented over two years ago
- You haven't gotten around to learning the whole system
- You're using workarounds and losing productivity

WIPFLI

# Maximize your CRM investment

Keep your customer relationships in great shape. Our customer relationship health check tells you what you need to know to manage and influence your customer relationships. Evaluate your account management efforts, check customer KPIs and build a plan for improvement.

## Organizational analysis

Wipfli assesses the existing people, processes and technology surrounding your customer relationships. Our specialists look for inefficiencies, identify possible gaps in employee knowledge and provide recommendations to make sure you're learning everything you need to know about your customers.

## Technology analysis

We evaluate your current CRM solution to identify gaps, potential short-term and long-term enhancements and necessary investments to move forward. We make sure your CRM supports your business strategy and tracks the vital signs you need to keep an eye on. A health check helps you do more with your CRM and use existing features to your advantage.

## Roadmap

Wipfli's customer roadmap provides a realistic plan to improve your customer relationships. Whether you need to uncover growth opportunities, address pricing models, find the best leverage points for team improvement, get better data or redesign account management – Wipfli provides the insights and recommendations to address your business priorities.

Health check package	Standard	Select	Premier
Customer relationship health check (foundation)			
High-level organizational process review	■	■	■
Gap analysis	■	■	■
Prioritized improvement recommendations	■	■	■
Investment analysis		■	■
Business roadmap			■
Technology health check (optional add-on)			
Current tool and technology (including CRM) review	■	■	■
Gap analysis	■	■	■
Prioritized recommendations/improvement opportunities	■	■	■
Growth and CRM process review and detailed system review		■	■
Technology investment analysis		■	■
KPI and industry benchmark analysis		■	■
Interviews with relevant people/users			■
Expanded survey results (named or anonymous)			■
Customer roadmap (including CRM)			■
Charter, including organizational chart/roles analysis			■
Formal presentation of findings			■

## Let's get started

Get more from your CRM. Contact us to learn more about our customer relationship health check. [wipfli.com](http://wipfli.com)