Briefing Guide

Outline Template for CRM Entity Field Definitions

(Pre-Scoping Workshop Exercise)

CRM Application :- TBC

Your Details	
Client Name	
Contact	
Existing CRM system	
Tel	
Email Address	
Website	

It is also useful for you to identify the key objectives for introducing a CRM or new CRM system.

Your Objectives	
Objective #1	
Objective #2	
Objective #3	
Objective #4	
Other comments	

Introduction to this document

The aim of this document is to enable you to compare to your system and quickly identify which fields you want changing, removing or adding. Please go through each of the core entities adding your comments and then email, scan or fax back to us.

Email – sales@marketinganswers.co.uk

Fax – 0844 745 4589

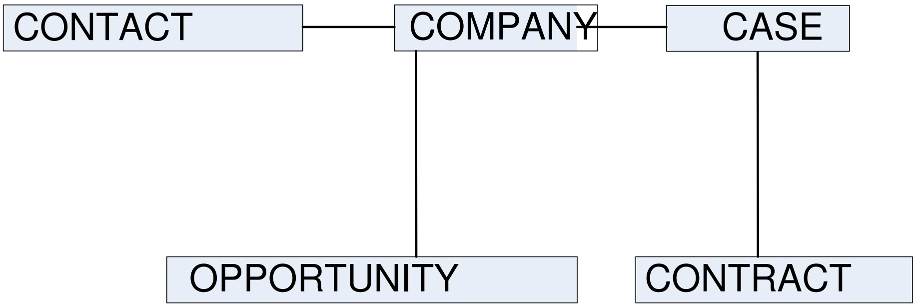
Once received, this will enable us to move quickly to the next stage.

At this initial point, we are looking for your 'first pass' ideas to simplify and add to your system.

1.Typical CRM Entities

Most full CRM system have a number of typical entities or tables that are linked around the core record, typically a Company or Account Record as per the diagram below.

The information held in a CRM system is categorised into different types, with relationships between the types. In addition to the standard information that a CRM system would normally contain, this system is required to hold additional entities: Contract. An example is a diagram of the relationship of the main entities as an example:-



This document is intended to give you some ideas to think about the various fields you may need to track against different types of records. The terminology and default fields will vary between CRM systems, but this gives you a strong starting point to consider which pieces of information you need to store and track.

The Workflow or Scoping Workshop(s) then help to define these items and areas in a lot more detail.

You may not know each entity that you require, but document this can help you prepare for a Scoping Workshop in advance and ensure time is spent on value added areas. A useful exercise is to list all of your existing systems in use and their format together with the number of records.

Existing Sales, Marketing and Helpdesk systems Used		
	Existing system	**Comments**
CRM System		
Sales Forecast System or log		
Helpdesk System or Log		
E mail Marketing		
E mail system in Use		
MS Office version		
Other:		
Other:		
Other:		

2. “Company or Account”

The Company entity holds information about an organisational unit that you do business with. Information can be recorded against the company, or against people working for the company.

*Indicates Mandatory Fields with Red Text and Recommended with Green

Field name	Rename to?	Field Type	Selection Values	Restricted to?	Edit/Rename/ Remove
Account Name*					
Account Number					
Parent Account					
Primary Contact					
Relationship Type			e.g. Prospect Customer		
Main Phone					
Other Phone					
Fax					
Web Site					
Email					
Address Name					
Street1					
Street 2					
Street 3					
City					
County					
Postal Code					
Country					
Phone					
Address Type					

Note: Address fields are often contained as their own entity.

Any new Fields you require?

Field name	Tab*	Field Type	Selection	Restricted to?	Edit/Rename/ Remove
EXAMPLE1 Employee Band		Tick box/Radio button	10-20 21-50	None	

3. “Contacts or Persons” Entity

Person records hold information about people who represent customers or potential customers, someone related to a company, or an individual.

Field name	Tab*	Field Type	Selection	Restricted to?	Edit/Rename/ Remove
Salutation					
First Name*					
Middle Name					
Last Name*					
Job Title					
Parent Customer					
Currency					
Business Phone					
Home Phone					
Mobile Phone					
Fax					

New fields you require?

Field name	Tab*	Field Type	Selection	Restricted to?	
EXAMPLE1 Interest		Selection	Golf Cricket	None	

5. “Leads”

Leads is often an optional Entity – please have a think about whether you would like to use the Leads Entity, or whether you would prefer to manage all enquiries as Opportunities. The main advantage to using the Leads entity is that it keeps your database free of unqualified prospect data. In other words, all your Accounts will be customers rather than having some prospect Accounts.

One possible disadvantage of using the leads entity is that it may mean your sale team will need to manage the process between, creating Leads, qualifying them, converting them to Accounts and Opportunities.

Yes we would like to use Leads ☐

No we don’t want to use Leads ☐

We require more information on this entity ☐

4. “Opportunity” or “Potential Sale”

An opportunity record holds all the information relevant to a particular sale.

Field name	Tab*	Field Type	Selection	Restricted to?	Edit/Remove/ Rename
Description of Opportunity					
Potential Customer					
Owner					
Stage			e.g. Initial Stage Proposal Stage		
Source Campaign					
Revenue					
Close by Date					
Probability					
Est. Value					

Any new Fields you require?

Field name	Tab*	Field Type	Selection	Restricted to?	Edit/Rename/ Remove
Example Product Group		Selection	A B C	None	NEW

Yes we would like to use Opportunities ☐

No we don’t want to use Opportunities ☐

We require more information on this entity ☐

6. “Cases or Tickets”

Cases are an optional entity – please have a think about whether you would like to use the Cases entity. Cases may relate to your Customer Service Department and enables them to log, track, progress and resolve cases. We often find that companies implementing CRM systems, will use the basic entities first and build their staff’s knowledge and confidence in using the system, then implement this part as Phase II.

Field name	Tab*	Field Type	Selection	Restricted to?	Edit/Remove/ Rename
Case #					
Description of Issue/Case					
Date Opened					
Owner					
Stage			e.g. Logged,		

			Queued, Solved		
Source					
Close by Date					
Severity					

Any new Fields you require?

Field name	Tab*	Field Type	Selection	Restricted to?	Edit/Rename/ Remove
Example Product Group		Selection	A B C	None	

Yes we would like to use Cases ☐

No we don't want to use Cases ☐

We require more information on this entity ☐

7. "Contract"

A contract could be a simple support contract or more complicated multiple contracts , for example a IT 'Support contract'.

Field name	Tab*	Field Type	Selection	Restricted to?	Edit/Rename/ Remove
Contract #					
Contract Description					
Contract Start Date					
Contract End Date					

Any new Fields you require?

Field name	Tab*	Field Type	Selection	Restricted to?	Edit/Rename/ Remove
Example Product Group		Selection	A B C	None	

Yes we would like to use Contracts ☐

No we don't want to use Contracts ☐

We require more information on this entity ☐

7. “Assets or “Equipment”

An Asset could be a piece of Equipment or an Equipment register. Cases could be logged against a piece of Equipment for Example

Field name	Tab*	Field Type	Selection	Restricted to?	Edit/Rename/ Remove
Equipment #					
Serial Number					
Equipment Type					
Equipment Description					

Yes we would like to use Assets ☐

No we don’t want to use Assets ☐

We require more information on this entity ☐

Please complete and either scan or email a scanned copy to:- sales@marketinganswers.co.uk