Preparing for Agvance CRM

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Successfully implementing a CRM (Customer Relationship Management) program at your business is a process requiring planning and execution. In the business world, a number of CRM implementations fail for a variety of reasons but often they lack management involvement in the implementation plan or underestimate the staff commitment required.

Agvance CRM is specifically designed for the ag-retail industry and leverages existing Agvance data. The key to a successful implementation of Agvance CRM is developing a workable plan and timeline. The plan should be focused and realistic and should include specific goals with measurable metrics.

Below are the key features of Agvance CRM module. Your management team should review these and prioritize based on your goals.

What Features will Your Company Utilize?

CRM has five main functions:

1. **Automated Document Delivery via Email –** Allows documents generated in Agvance to be automatically emailed to customers as PDF attachments. Documents can be emailed directly as the transaction is saved, or saved to a queue for distribution at a later time. The following documents are available for delivery:
   - Invoice
   - Statement
   - Bud. Billing Statement (Energy)
   - Delivery Ticket
   - Booking
   - Blend Ticket
   - Worker Protection Sheet (WPS)
   - Sales Order
   - Grain Settlement
   - Grain Purchase Contract
   - Grain Purchase Offer Contract
   - Grain Balance Detail Statement
   - Field Plan
2. **Customer Communication Journal** – This function allows users the ability to enter communication journal entries and store them for each customer in the Agvance database. These entries can be classified as *Email Communication*, *Phone Communication*, or *Meeting*. Communication journal entries can be made in the CRM module, in the Mobile Sales module, or automatically via a Microsoft Outlook plug-in. The entries can be viewed from within CRM or Mobile Sales and exported for reporting purposes.

3. **Customer Activity View –** This function allows a CRM user to see all Agvance transactions spanning all Agvance modules from one convenient dashboard. Previously, for a user to see invoices and grain transactions, the user would need a license for the Accounting module and another license for the Grain module. With CRM, a user can see all transaction types from this one screen.
4. **Customer Gap Analysis Report –** This powerful tool exposes sales numbers by department and category, and grain transaction numbers placed side-by-side in a grid. This opens the door for data mining on customer activity to answer high-level questions regarding customer revenue potential. "Who are the company's big grain customers who are not buying seed from us?" would be an example of a question that could be answered by this functionality.
5. **CRM Business Details –** Within the customer file there is an area to enter specific business details about a customer's total business profile. This area is free-form and allows users to set up categories and sub-categories for customer business details and then assign those categories a value that can help define the size of the customer's business potential. For instance, a customer could be defined as a 1000-acre field corn farmer in this area.

Deciding which of these functions your company most wants to use will help your implementation process greatly. It may be valuable to prioritize the list of functions that you plan to use:

1. ____
2. ____
3. ____
4. ____
5. ____

Setting Realistic CRM Implementation Goals

In order to have a successful CRM implementation it is very important to set realistic company goals for each of the areas of functionality that you intend to use. For instance, it is unrealistic to capture CRM business details for 100% of your customers in the first few months of implementing the module. A goal for CRM implementation should include a measurable metric and a time deadline. For example:

- Our company plans to enroll 50 customers in electronic statement delivery process by the close of September this year.

OR

- Our company plans to get all of our sales reps using the Customer Communication Journal to track communications for our top 50 customers by the end of August this year.

Furthermore, each goal should be assigned an employee responsible for overseeing its implementation. Your company should have the appropriate number of goals based on the areas of CRM that you plan to use. Some companies may only have one or two goals, while others may have several, but it is important to set realistic expectations.

Here is an area to list your company's CRM goals:

Goal	Owner
1.	
2.	
3.	
4.	
5.	

Defining Specific Tasks Required for Each Goal

Each goal will require tasks be carried out in order to reach the desired completion date. The tasks should have a task description, a responsible person(s), and an expected timeframe (term) for completing the task. In some cases, completion of one task may be dependent on the completion of a prior task. For example:

Goal:______ Capture Business Details for top 50 customers by end of August this year________

Task	Owner(s)	Term	Dependent on
1. Define Business Categories	Tim	1 week	________________________________
2. Define Business Sub-Categories	Tim	1 week	task 1

Below is a task list sheet that can be filled out for each goal defined.

Goal:____ Date to Complete: __________

Task	Owner(s)	Term	Dependent on
1.			
2.			
3.			
4.			
5.			