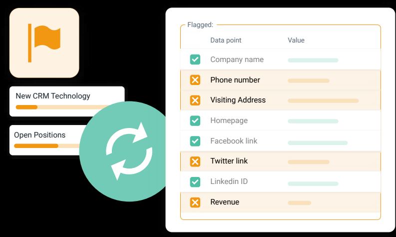
Vainu's Checklist for a High-Performing CRM

An outline of key areas to help you get the most out of your CRM setup



This checklist helps you assess CRM setup readiness and walks you through all the steps to tick all the right boxes for a genuinely data-driven sales process.

1. Before you get started

Your strategy should dictate the way you set up your CRM, assign roles and responsibilities, and choose how you measure success.

Document the basics

Build a strategy. Review your current workflows, processes, and tools.

- [ ] Define your total addressable market.
- [ ] Define your ideal customer profile.
- [ ] Define your buyer persona.
- [ ] Choose KPIs that are directly related to your business goals.

Decide on roles and responsibilities

Describe the different roles involved in delivering your CRM strategy.

- [ ] Choose who's responsible for the CRM and data quality.
- [ ] List the different types of CRM user roles and permissions.
- [ ] List the data quality responsibilities of each user role.

Evaluate your existing CRM setup

Assess whether your CRM is working effectively.

- [ ] Are you happy with the CRM you're currently using?
- [ ] Does it have the robustness to manage all the companies in your total addressable market?

- [ ] What will you be using your CRM platform for?
  - [ ] Track opportunities
  - [ ] Sales reporting
  - [ ] Source leads
  - [ ] Track meetings
  - [ ] Dig into account insights before meetings

2. Audit your existing data

Finding data inconsistencies and duplicated contacts opens the door to additional data points and richer insights.

- [ ] Do you have business IDs for each company?
- [ ] Do you have duplicate entries for companies/contacts?
- [ ] Do you have all the ideal data points as attributes in your CRM?
  - Firmographic
    - [ ] Industry
    - [ ] Location
    - [ ] Size and revenue
    - [ ] Other important datasets
  - Technographic
    - [ ] Social media channels
    - [ ] Tools and platforms used
    - [ ] Digital footprint
    - [ ] Other important datasets

3. Build a solid foundation

By getting correct data into your CRM, you'll see the winnings of having access to rich, real-time company information.

Clean up your database

Detecting and removing corrupt or inaccurate records from your database.

- [ ] Fix capitalization and formatting issues.
- [ ] Set some ground rules.
- [ ] Remove redundant fields.

- [ ] Don’t be afraid of hitting delete.
- [ ] Get rid of duplicates.

Add missing information

Fill in blanks in your data with our exhaustive firmographic and technographic information.

- [ ] Enrich your data
- [ ] Select the data points you want to add:
    - [ ] Add business IDs.
    - [ ] Add firmographic data points.
    - [ ] Add technographic data points.

Automate your database maintenance

Run continuous data cleaning and enrichment processes to ensure you always work with up-to-date data.

- [ ] Set up automatic data enrichment processes.
- [ ] Schedule regular data cleaning.

4. Integrate with other tools and systems for a smooth experience

When software is integrated, all teams have a complete picture of the buyer lifecycle, from visitor to customer, at all times.

- [ ] Connect your CRM data with your marketing automation platform:
    - [ ] Enrich inbound leads with releant company information.
    - [ ] Shorten online forms.
    - [ ] Route leads to the right sales reps.

- [ ] Extend your CRM data to customer success platforms:
    - [ ] Automate onboarding and renewal workflows.
- [ ] Integrate document and proposal software.
    - [ ] Link deals to proposals.
    - [ ] Create workflows to see proposal activity at any step of the sales process.
- [ ] Connect your CRM platform to instant messaging apps (e.g. Slack):
    - [ ] Set automatic notifications to your sales reps.

5. Create automated workflows based on data triggers

When you reach out to a prospect based on a trigger event, you have all the information you need to deliver a tailored, relevant offer.

- [ ] Select the changes in companies or contacts you would like to track.
- [ ] Build workflows to create automated actions based on these trigger events.
- [ ] Craft pre-defined messaging and include it in the actions to personalize campaigns based on each trigger event.
- [ ] Use these changes as criteria to create audiences for account-based marketing campaigns.

Further reading

- **Don’t blame the CRM! How to Sell More with Company Insights**
  45-page handbook with the actions you need to take to turn your CRM into the backbone of your sales organization.
- **5-Step Guide to Implementing Real-Time Sales**
  Learn to use real-time company data and uncover best-fit prospects, reveal the ideal timing to reach out, and create relevant messaging.
- **Vainu Real-Time Sales Master Class**
  Eight lessons, delivered straight to your email inbox with the most valuable content.
- **The 100+ Best Sales Tools**
  100+ sales tools in 10 categories every B2B professional should know.

VAINU

Vainu is building a Sales Intelligence platform that helps salespeople and marketers move forward. Powered by technology to collect, read and understand all company information ever written, Vainu makes these real-time company insights easily consumable directly in its customers' existing business systems.

Headquartered in Helsinki, Finland, the company launched in 2013 and is now at €15 million in annual revenue with a team of 150, spread across Europe. Over 2,000 sales and marketing teams globally use Vainu's data to personalize customer interactions at scale—ultimately leading to more sales.

Learn more at www.vainu.com.