LIFT Enablement

THE STRATEGIC REVOPS ADVANTAGE™

The Strategic CRM Scorecard™

Indicate the degree you agree or disagree with these statements, then total your score.

Statement	DISAGREE 1–10 AGREE	Score
We have a strong foundation for our data structure and architecture, maintaining clear relationships between companies, accounts, contacts, opportunities, and activities, allowing users to trace the complete history of any customer interaction easily.	1 2 3 4 5 6 7 8 9 10	
We have strong processes to ensure strong data cleansing, enabling us to efficiently identify and merge duplicate records, update outdated information, and archive inactive accounts.	1 2 3 4 5 6 7 8 9 10	
Our CRM enables our sales team to execute rapidly and directly contributes to increasing the revenue generation capacity of each salesperson.	1 2 3 4 5 6 7 8 9 10	
Our CRM increases the predictability of our business by enabling reps to forecast opportunities efficiently, providing executives with real-time insights and closed-loop reporting. This has had a positive effect on increasing the level of accountability in our go-to-market organization.	1 2 3 4 5 6 7 8 9 10	
Our CRM enables everyone in our go-to-market organization to efficiently and effectively see the status and impact of their efforts, enabling us to connect efforts to outcomes and results.	1 2 3 4 5 6 7 8 9 10	
The sales pipeline is updated consistently, showing real-time deal stages, values, and close dates.	1 2 3 4 5 6 7 8 9 10	
Our dashboards are clear and distinct and enable each user to track their relevant KPIs, ensuring everyone is working from the same source of truth.	1 2 3 4 5 6 7 8 9 10	
Our CRM does an exceptional job of segmentation, enabling everyone in our go-to-market organization to be confident they can take the right action with the right person at the right time.	1 2 3 4 5 6 7 8 9 10	
Our CRM enables us to proactively identify churn risks and upsell opportunities through customer data and engagement.	1 2 3 4 5 6 7 8 9 10	
Our leadership actively uses CRM analytics to make data-driven decisions and improve processes.	1 2 3 4 5 6 7 8 9 10	

TOTAL SCORE