System Planning Cheat Sheet

Needs Analysis

Ask questions, actively listen and take notes: be the "dumbest person in the room"

1. Question
2. Answer (from client)
3. Confirm your understanding of the answer
4. Ask follow-up questions (if applicable)
5. Ask the next question (don't feel the need to ask ALL of the below questions —they're just there as a guide)

Keep them talking — keep the subject focused on their vision, goals, pain points, etc. Don't monopolize the conversation.

Record the meeting if you can!

Pillar #1

"How do you find potential customers?"

"What is the process of potential customers becoming full customers?"

"Tell me about some of your best customers."

Are there any common denominators you see among those best customers?

"What are the biggest "pain points" you see that are either:

Harming your customer's experience

Keeping you from more efficiently running your customer lifecycle

Pillar #2

"Once I understand your customer lifecycle better, I'll be making a plan and flowchart that outlines what I'm hearing. You'll then have a chance to approve that plan"

Pillar #3

"Ultimately, my goal is to build you a software system that can help you automate and organize your entire customer lifecycle."

Are you currently using a CRM?

"What CRM software are you currently using?"

"What do you like and dislike about your CRM and software?"

Are there any other software tools that you've been interested in?

Project Logistics

What is your timeline for getting a new CRM system built? What will happen if it's not built quickly enough?

(Warning: this is an advanced question!)
We've seen projects like this cost up to *-throw out ballpark price-*.
Assuming the system is capable of solving all the problems we've talked about, is that within your budget?

Initial System Outline

Remember!

The main priority of the Initial System Outline is to get everyone on the same page.

"This is what I heard you tell me your priorities and goals are. Did I correctly understand that?"

Creating an Initial System Outline

Step 1: Review Your Needs Analysis and Synthesize Your Notes

Step 2: Brief Outline of the Organization and Its Customer Lifecycle

Step 3: "System Goals" Section — Bullet Points for Each Priority, Sort By Highest Priority

Step 4: Attach a Basic Flowchart

Step 5: Submit to Client

Sample Initial System Outline (Doc)

Sample Initial System Outline (Flowchart)

Final System Plan

In a Final System Plan, we outline all the steps that the CRM builder will need to take to accomplish the task.

The Final System Plan is more for you than it is for the customer!

It helps with:

- Understanding "can this be built in the CRM"
- How long will it take to build
- How expensive it will be
- What order steps should be taken in
- Whether there are any knowledge gaps that need to be filled in

Of all the things we've talked about, which features and problems are the highest priority?

Sample Final System Outline

Initial System Outline for Affluence Financial Planning

Affluence Financial Planning is a financial planning firm based out of Salt Lake City, Utah.

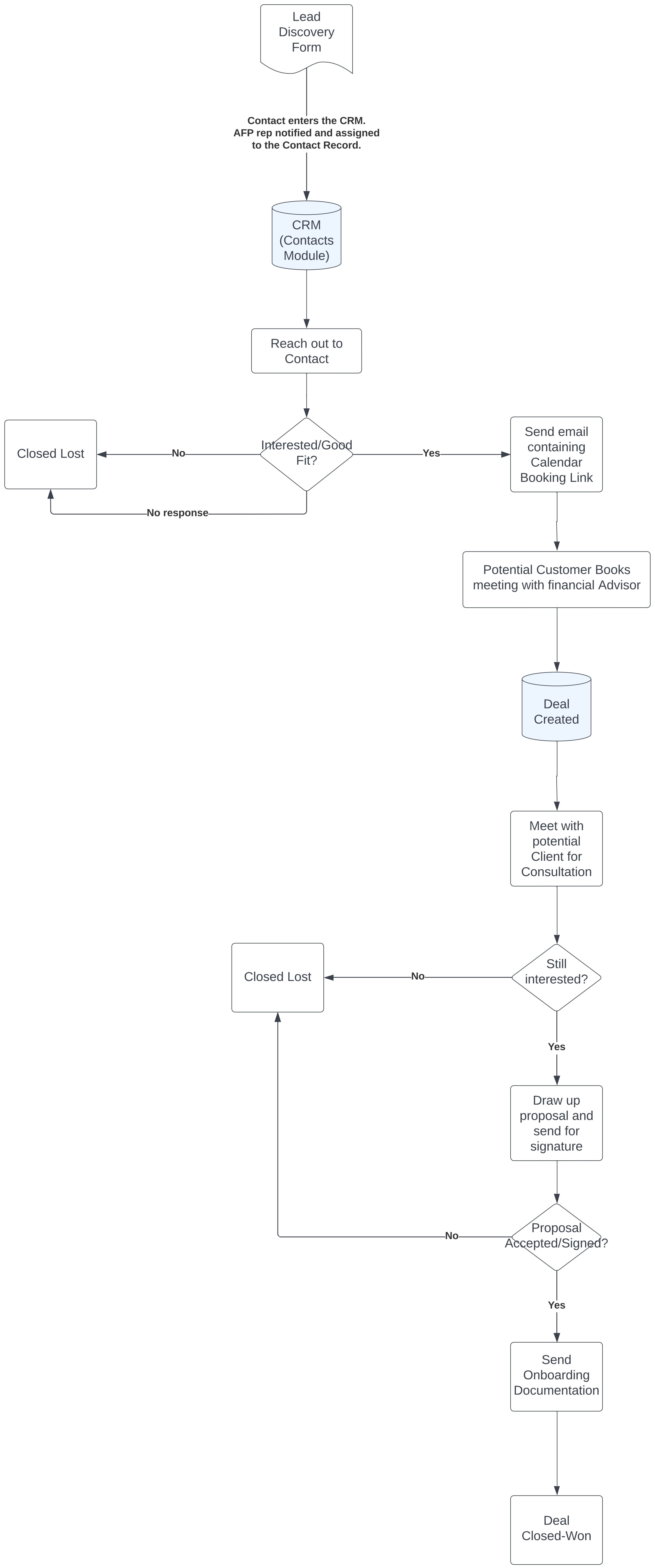
Customer Lifecycle

- New Leads/Marketing
  - Lots of Chamber of Commerce events attended (business cards, phone numbers, chance encounters)
  - Free financial classes we offer (both in-person and virtual webinars)
  - Some word-of-mouth referrals, usually who either call in or send us an email out-of-the-blue
  - Some people who fill out our webform
- Sales Process
  - We do an initial financial meeting with them
  - We produce a personalized proposal for them with pricing
  - We follow up until they either accept it or reject it
  - We need them to sign some contracts + onboarding docs
- Customer Success/Renewals Process
  - Reaching out to previous customers who want to do another plan with us (or who can give us referrals)
  - Trying to convince customers to show up to additional workshops so we can upsell them on new packages
  - We give a 10% discount for each additional follow-up package people do with us

System Goals/Pain Points (Sorted by priority)

- **Record Organization and Relation**:
  - Right now, all of their customer, lead, and Deal information is contained with an excel spreadsheet
  - Everything is a jumbled mess
  - Quotes and proposals and notes are stored in a separate area that's unattached from the spreadsheet
- **Lead Intake**:
  - Affluence Financial currently has a "Receive a Free Financial Evaluation" form, however it doesn't currently feed into a single database. As it stands

now, their staff get notified of submitted entries through email, they then manually enter data into a spreadsheet.
    - They get business cards, phone calls, and emails, but those don't always make it into the spreadsheet — those people then fall through the cracks
    - It's really hard to follow-up with people that show up to workshops, and a lot of those people fall through the cracks
- **Potential Customers + Customers "Slipping Through the Cracks**":
    - They forget all the time about previous customers/potential customers that could totally use a follow-up and might be ready to close now.
- **Calendar Bookings**:
    - They are looking to make it easier to book a consultation with their financial planners. It's annoying to go back and forth and back and forth on scheduling something.
- **Reporting**
    - **There's no easy way to see:**
        - **"How much $$$ have we quoted?"**
        - **"How much $$$ have we closed?"**



Lead Discovery Form
Contact enters the CRM.
AFP rep notified and assigned
to the Contact Record.
CRM (Contacts Module)
Reach out to Contact
Interested/Good Fit?
No
Closed Lost
No response
Yes
Send email containing Calendar Booking Link
Potential Customer Books meeting with financial Advisor
Deal Created
Meet with potential Client for Consultation
Still interested?
No
Closed Lost
Yes
Draw up proposal and send for signature
Proposal Accepted/Signed?
No
Yes
Send Onboarding Documentation
Deal Closed-Won

True North Wealth: Final System Plan

Below is a detailed list of will need to be built in the CRM to ensure that this System Plan can be put into action. As the scope of the project is fairly simple, the duration of the project will also be smaller. We estimate that this will take no more than a day to implement.

Modules & Fields: We recommend that the Leads module be hidden from view while all existing & future leads be moved to the contacts module. An assignment rule will be built for the Contact module which will assign new leads according to the following Logic:

IF Contact Type = Lead AND "Interested Services" contains:

1. Wealth Management, Estate Planning, Retirement Planning, Social Security
    a. Assign Contact Owner to Agatha Abernathy
2. Investment Planning, Insurance Planning, Income Tax Planning, Selling a Business
    a. Assign Contact Owner to Winston Rutherford III
3. College Savings, 401(K) Solutions,
    a. Assign Contact Owner to Gildiroy Lockeheart

- **Contacts** (Default)
    - Contact Type (Single Select)
        - Lead
        - Potential Client
        - Client
    - Lead Source (Single Select)
        - Webform
        - Walk-in
        - Phone
        - Other

    - Interested Service (Single Select)
        - Wealth Management
        - Estate Planning
        - Investment Planning
        - Retirement Planning
        - Insurance Planning
        - Income Tax Planning
        - College Savings Plan
        - 401(K) Solutions
        - Selling a Business
        - Social Security
    - Lead Status
        - Not Contacted
        - Contacted
        - Requires Follow-up
        - Interested
        - Not interested
        - Junk Lead
    - Reason for Disinterest
        - Lost to Competitor
        - Too Expensive
        - No Longer Requires Service
        - Other
    - Follow-up Message (multi-text)
    - Email Automation
    - Follow-up Date
    - Client Comments
- **Deals** (Default)
    - Service Rendered (Single Select)
        - Wealth Management
        - Estate Planning
        - Investment Planning
        - Retirement Planning
        - Insurance Planning
        - Income Tax Planning
        - College Savings Plan
        - 401(K) Solutions

        - Selling a Business
        - Social Security
    - Deal Stage
        - Qualification
        - Proposal Under Review
        - Proposal Accepted & Signed
        - Negotiating
        - Closed-Won
        - Closed-Lost

Workflow Rules:

- Email automation for Leads: trigger when the field "Email Automation" is EDITED
    - IF "Email Automation" IS "Lead Follow-up"
        - Send Lead Follow-up Email (Using the Lead Follow-up Template
- Add to Newsletter: This will trigger whenever a Deal is CREATED
    - All Deals
        - Update the field "Newsletter Status" to the value 'Yes"
- Email Bookings Link: This will trigger when the status of a contact is edited to the value "Interested".
    - Contact type = Lead
        - Send email to Contact's email containing a bookings link to schedule an appointment with financial planner.

Blueprints: We will build the following two blueprints. Below is a short synopsis about which mandatory fields, triggered emails, and created tasks are associated with which transition.

- Leads
    - Not Contacted (Initial Status)
    - Contacted
        - Notes
    - Requires Follow-up
        - Create followup task
        - Require:
            - Follow-up Date
            - Email

            - Message
            - Notes
    - Interested
        - Notes
        - Interested Service
    - Not interested
        - Reason for Disinterest
        - Notes
    - Junk Lead
- Deals
    - Consultation Scheduled (Initial Status)
    - Proposal Sent
    - Proposal Accepted & Signed
    - More Negotiation needed
    - Closed-Won
    - Closed-Lost
        - Closed Lost Reason
        - Notes

Templates:

- Lead Follow-up: This email template will be sent to Contacts if a representative selects "Lead Follow-up" from the email automation pick list within the Leads Blueprint. This follow-up template will also merge in the value entered into the field "Follow-up Message" if a representative decides to add a personalized message.
- Book An Appointment: This template will contain a link to the financial planners calendar booking tool to schedule a more lengthy meeting.

Lead Discovery Form:

- Name
- Email
- Interested Service(s) (Multi-Select)
- Phone
- Comments
- HIDDEN: Contact Type = Lead (Mapped to Contact Type)
- HIDDEN: Lead Source = Webform (Mapped to Lead Source)

Reporting: Zoho Analytics is overkill for what we need to build. All dashboard items are pretty simple and each to build in CRM Analytics.

- **Overdue Tasks**: This will show all tasks for which the due date is in the past. This will mostly end up displaying lead follow-ups, but I imagine that there will be other tasks created for users as well.
- **Lead Source**: This will be a simple bar chart which displays the most common sources of our leads.
- **Most Common reasons for disinterest:** Simple bar chart displaying the most common reasons why people are disinterested in our services, arranged from most common to least common.
- **Most common reasons for losing deals**: Simple Bar chart displaying the most common reasons why deals are not closing, arranged from most common to least common.
- **Leads Pipeline**: A pipeline which displays the stages of all Contact records for which Contact Type IS Lead.
- **Deals Pipeline**: A pipeline which displays the stages of Deals in their pipeline, excluding closed-won and closed-lost.