

AptusPAR CRM Implementation & Optimization

No matter the size of the company, once you reach a certain number of clients and have scaled your sales team accordingly, you are likely either implementing a CRM system, such as Salesforce or HubSpot, or have purchased one already, but it's just not optimized for the needs of your business.

It's also likely that you are running into some obstacles as you evolve. Common ones we hear are:

- "We're trying to implement and customize the CRM in-house because we don't have the budget for high-priced professional services."
- "We've enlisted a professional services organization, but the engagement was long and expensive, and the result is still not optimized to meet the specific requirements of our business."

AptusPAR is here to help. We take the time (not waste the time) to first understand the unique needs of your organization, to properly align them with the trusted subject matter experts who we know will confidently bring the same focus to your business.

Instead of starting at the tactical level and turning on different features of a system that doesn't ultimately align with your business, we take a step back. We first have a business process review and rationalization conversation with you, ensuring that we are all on the same page as to what you need to accomplish, and that it will be aligned with your business processes. We ask questions such as:

- Do you have a unique SKU system? Does it need to be simplified?
- Do you sell direct, through a channel, or both?
- What groups within your organization need access and how will they use it?

Answers to these types of questions will help us ensure that your CRM is performing as needed and expected at the end of our engagement. While it may seem like going through this important step adds time to the beginning of the engagement, it will ultimately produce the right end result for your business.

[Contact us](#) if you would like to discuss how we can help you with your CRM optimization or implementation needs.

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