## Do you know where your deals are?
## 3 Easy Ways to Get More From Your Investment in CRM

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| **First Name:** | |
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| **Business Phone:** | |
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| **Address 1:** | |
| **Address 2:** | |
| **City:** | |
| **State/Province:** | -- Select One -- |
| **Zip/Postal Code:** | |
| **Country:** | UNITED STATES |
| **Number of Employees?** | |
| **Department:** | -- Select your department -- |
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**Are you using email, spreadsheets, or paper forms for any of the following processes? (Check all that apply)**

- ☐ **Purchasing / Finance (expense reports, travel authorization, purchase requisitions, etc.)**
- ☐ **Sales Operations (non-standard pricing, contract review, split commissions, etc.)**
- ☐ **Customer and Field Services (project status, customer action requests, timesheets, etc.)**
- ☐ **Operations and Administration (IT support request, HR requests, document approval, etc.)**

| | |
|---|---|
| **How soon would you like to automate these processes?** | -- Select one -- |
| **Is there a project or budget established?** | -- Select one -- |
| **What best describes your role on this project?** | -- Select one -- |

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**Abstract:** Although most CRM systems today give companies a valuable central repository for their information about prospects, partners and customers, they are still, for the most part, static applications that rely on good data being keyed in from reps to have the most value to a company. There are a host of sales related processes that impact the sales cycle that are still being handled by email and spreadsheets or paper and faxes. Most CRM applications are not designed to automate this transaction activity due to its variable nature. As a result, it is not unusual to see a company employing a variety of different quoting mechanisms; a combination of e-mail, spreadsheet templates and/or paper forms.

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