



# Harnessing CRM for Your Small Business

**Lunch & Learn Series**  
**February 18, 2020**

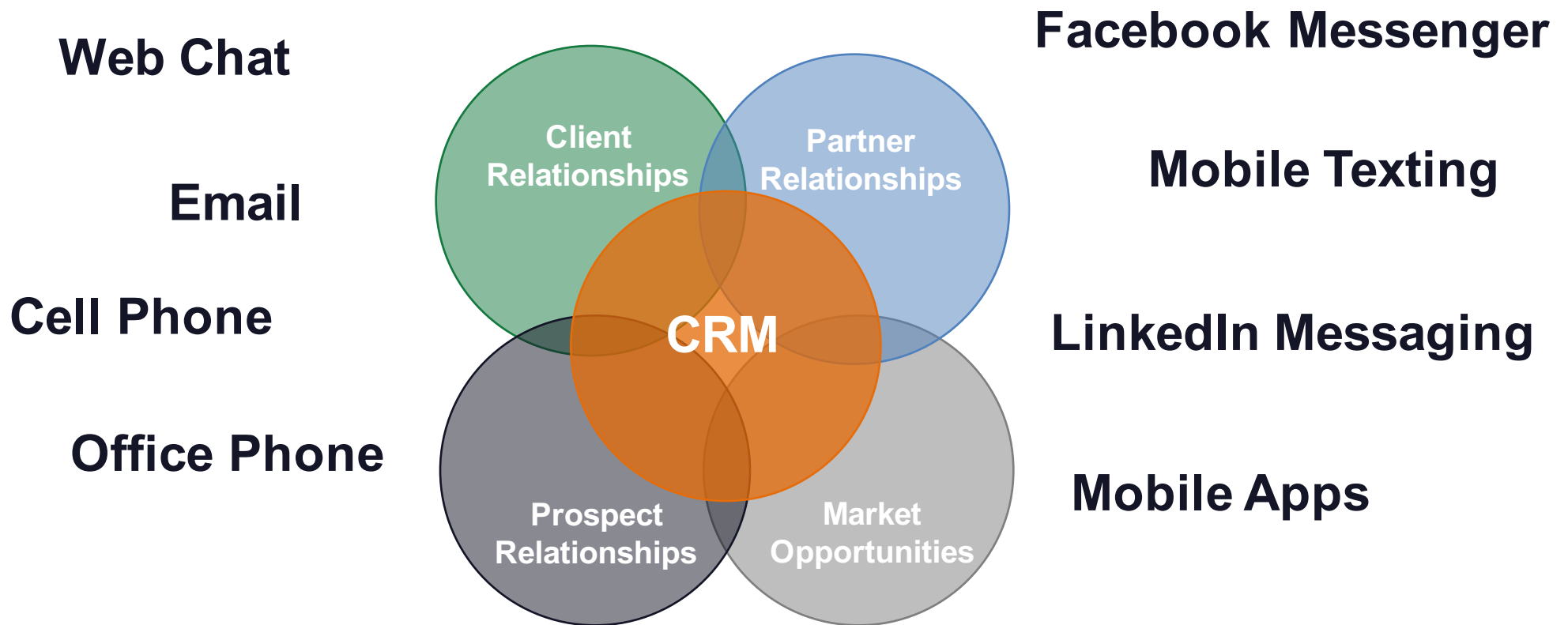


**Presented by:**

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**Chief Growth Officer**  
**Wendt Partners**

# CRM Ecosystem

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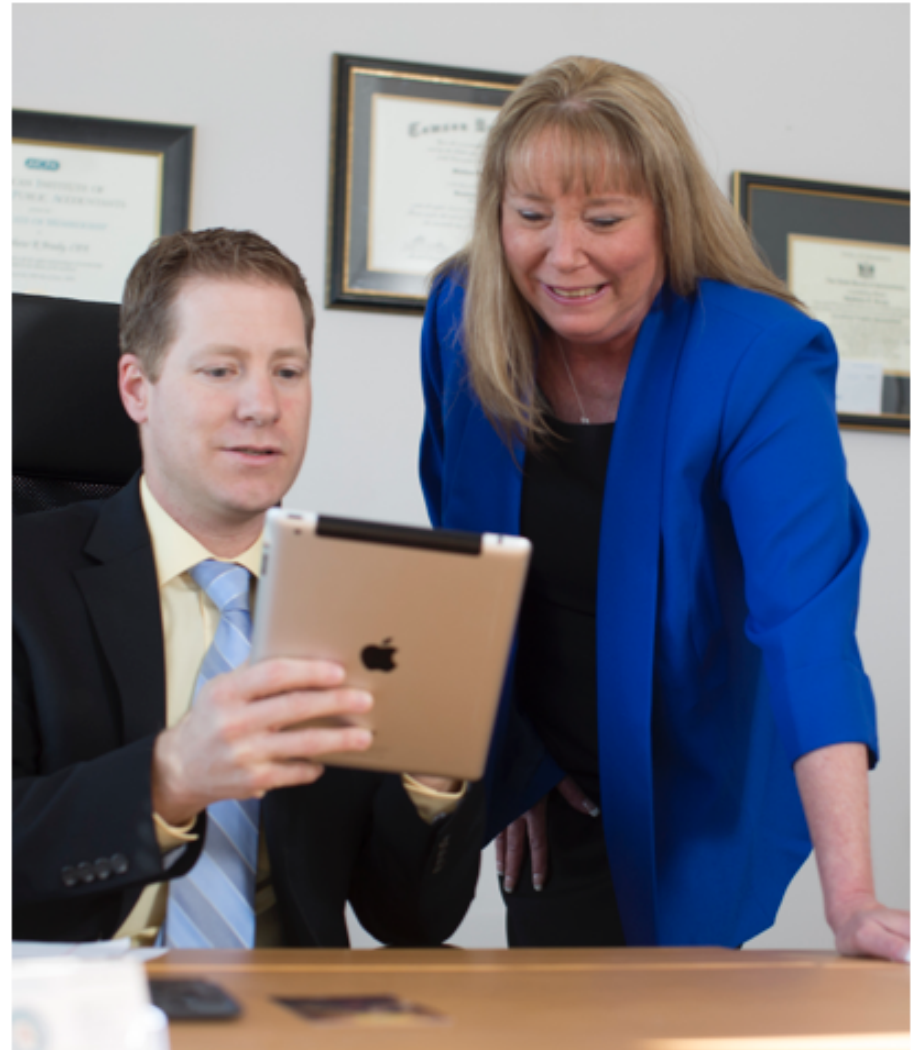


**Creating conversations wherever our customers and prospects want to have them.**

# Creating the Process: Re-Engage

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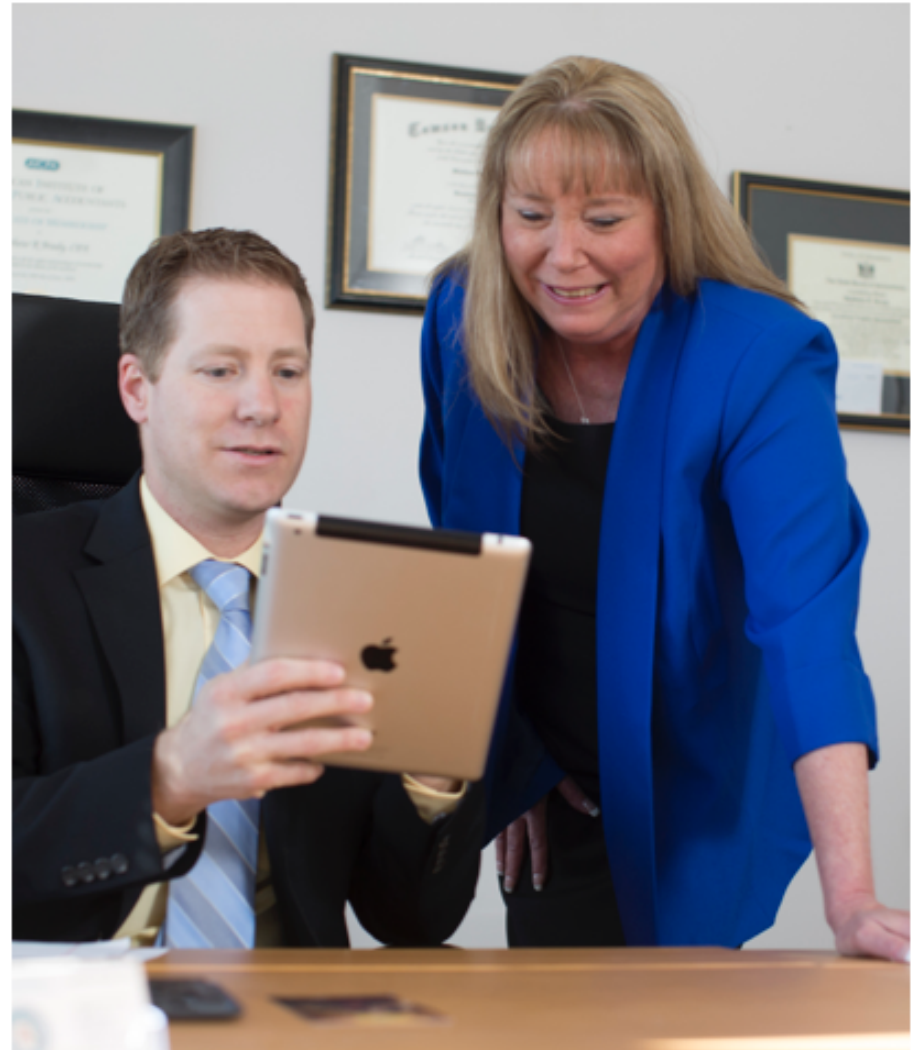
- Re-engage letter
- Phone call (offer?)
- Email invitation (event?)
- Social media
- LinkedIn (InMail?)
- Written Note
- Other formats



# CRM Strategy: Next Steps

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1. Organize and categorize your business relationships
2. Define the attributes and activity history you want to track
3. Establish and integrate your channels of communication
4. Define your workflows and processes
5. Prepare to execute so you can achieve your desired outcomes





**Thank you!**