

CRM

Customer Relationship Management

CRM LEADERSHIP TRAINING

EMPOWERING LEADERS,
EMBEDDING SUSTAINABLE CRM ADOPTION.

CASE STUDY

We bring your strategy to life



CRM is much more than software | Key Facts

OBJECTIVE

The previous CRM system was assessed in terms of adoption and use. Concerns about consistent CRM use were addressed, and motivation to use the new system was built. Sales leaders learned to handle resistance constructively and use the new CRM to manage sales and unlock market potential.



PROJECT DURATION

9 months



PROJECT DAYS

65



MTI CONSULTANTS

4 MIT consultants



INDUSTRY

Electrical engineering



TARGET GROUP

Sales leaders



TOOLS & METHODS

Survey to assess the current situation
CRM Maturity Check
MTI Conversa
Workshops



COUNTRIES | LANGUAGES

Germany, German



PROJECT VALUE

EUR 120,000



Initial situation

The existing CRM system had reached the end of its vendor support and needed to be replaced with a **future-ready solution**. At the same time, the system was only **used to a limited extent** by Sales, while departments such as Marketing and Customer Service made little or no use of it. As a result, there was no **single view of customer information** and no standardised sales process across departments

The success of the project depended less on the technical implementation than on **organisational change**. Sales leaders needed to become drivers of this change in order to build acceptance, address concerns and establish consistent use of the new CRM system throughout the company.



Objectives

The participants...

- › ... gain a clear picture of the current reality of CRM use.
- › ... identify and openly discuss key concerns.
- › ... commit to ensuring consistent CRM use as part of their leadership responsibility.
- › ... are able to inspire their teams to use the new CRM system.
- › ... can address resistance and concerns among their employees constructively.

CRM Excellence – Leadership. Processes. Results



Our approach makes CRM an active leadership and management tool for sustainable sales success.

CRM Excellence | Success factors

- **360°-Customer View**

Shared database for Sales, Internal Sales and Management

- **Acceptance through benefits**

Visible added value in everyday work creates sustainable acceptance.

- **CRM Excellence**

Governance, leadership, KPIs, training and coaching work together.

Measurable benefits

- ✓ Higher CRM usage rate
- ✓ Improved forecast quality
- ✓ Consistent sales processes
- ✓ Higher data quality
- ✓ Greater transparency for leadership and management
- ✓ Continuous development, including CRM and AI functions

CRM Excellence is a sustainable change process with measurable business benefits.

LESSONS LEARNED

From system implementation to a CRM culture in practice

- › **CRM is a leadership tool:** CRM delivers its greatest value when leaders model its use across departments and embed it in their everyday leadership.
- › **A 360° customer view depends on shared data:** CRM offers the greatest added value when Sales, Marketing and Service work with a shared database.
- › **Data quality creates added value.** Complete and up-to-date customer data provides the foundation for effective campaigns, informed sales decisions and excellent customer service.
- › **Every customer contact counts:** The more completely customer interactions are documented in CRM, the more valuable the shared knowledge base becomes.
- › **Acceptance before governance:** Acceptance develops when the specific benefits can be experienced in everyday work. On this basis, standards can be established for the long term.

Assess where you stand. Unlock potential.



How well is your CRM really set up for everyday work?

Our CRM Maturity Check provides a compact assessment of your current position. It shows where strengths already exist and in which areas you can further develop your CRM use in a targeted way.

[START NOW](#)

Implementing CRM is easy.

Using it successfully is the challenge.

Our CRM white paper shows which success factors are essential for a sustainable CRM transformation. It provides practical insights into data quality, processes, user acceptance and cross-functional collaboration – and shows how CRM can become a strategic management platform and the foundation for the successful use of AI.

[READ NOW](#)

Let's take the next step together

Get in touch – we will be happy to support you in evaluating your CRM Maturity Check and guide you on your way to a successful CRM transformation.



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