Overview

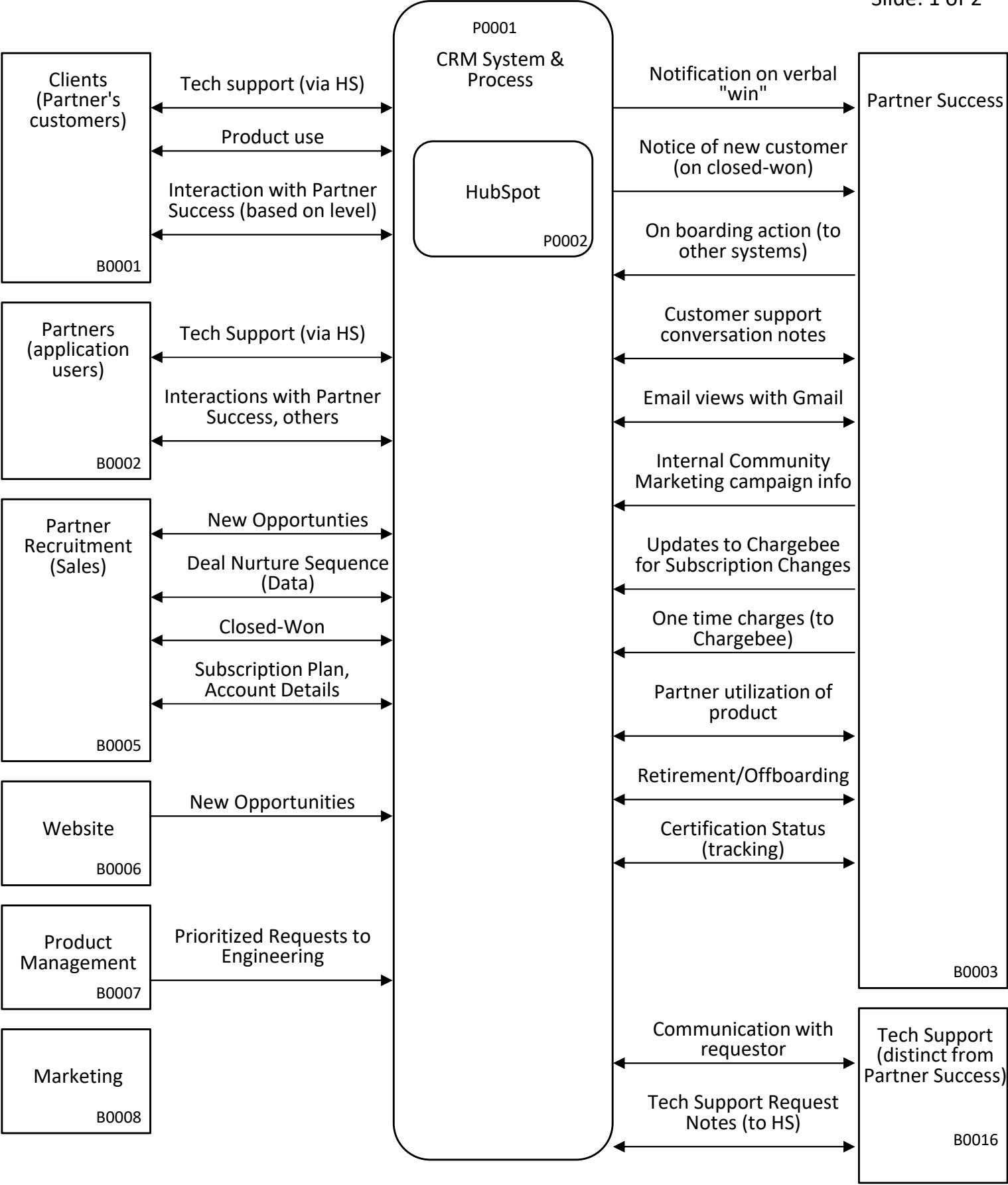(This example has been anonymized at the request of the customer.)

XYZ Co was implementing a new CRM system. We conducted a Map and Evaluate workshop to help create alignment and shared understanding among the project's department leaders.

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Area Title:	XYZ Co CRM	ID:	OG1ZQ7FF
Map Title:	CRM System & Process	Map ExtID:	U83NY24H
Map Type:	Map	Date/Time:	202X/XX/XX 12:53:46 AM

Slide: 1 of 2

Area Title:	XYZ Co CRM	ID:	OG1ZQ7FF
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P0001

CRM System & Process

Kajabi — On boarding (for courses) — CRM System & Process
B0009

Subscription Plan details (from Chargebee)

Zero (Accounting Package) — Account Update from ChargeBee
B0010

ChargeBee
B0011
- New Subscription Plan Details
- Subscription Changes
- One time charges (from Partner Support)

XYZ Co Conversations (the application)
B0012
- Onboarding
- Demo Access (should stop happening)

Office Operations & Finance
B0013

Slack (for messaging)
B0014

Tech Support (distinct from Partner
B0016
- Handoffs between Partner Success and Tech Support
- Elevation to Product Management
- Access to Knowledge Base (future)

Community Platform (Hive)
B0004
- On boarding
- Access by Others in Ecosystem

Knowledge Base (public facing)(future)
B0017

Engineering
B0018
- Interactions with Product Mangement

Looker
B0019

G-Suite (email, drive, calendar)
B0015

Map and Plan Area: **XYZ CO CRM Integration Project**

Map and Plan Area ID: **OG1ZQ7FF**

Map Title: **CRM System & Process**

List Title: **Map Parts, Evaluations, Priorities**

Date/Time: **2020/12/04 12:53:46 AM**

Flow codes: ==>[] : to Central Process;   <==[] : from Central Process;   <==> : to/from Central Process

Main Text
XYZ Co CRM   *Map and Plan Area Name*
CRM System & Process   *Map Central Process*
Note *Technical System or Machine*
Note *Future*
Note *Main Operations*
Note *Systems and Staff Operations of the Systems*
Major Goal *Access all information about all members from one spot and be in sync with the information*
Major Goal *All member demographics in one spot: location, line of business, subscription level, tenure, etc.*
Major Goal *Automation and consistency of workflow*
Major Goal *Surface the tacit institutional knowledge of the team for sharing among and beyond the team*
Major Goal *Remove business rules from the platform code*
Note *No reason that the platform has to track CRM data*
Major Goal *Getting visibility into the entire client relationship from all sides of the business*
Major Goal *Consolidate platforms; email marketing, campaigns, sales, marketing, community*
Major Goal *Managing legal requirements around consent for email marketing (GDPR)*
Major Issue *Fragmentation of information, no single source of truth for relationships*
Major Issue *Manual work taking too much time from busy people*
Major Issue *Time zone (Australia), having to wait for information*
Major Change Idea *Growth is forecast, to work with increased volume, have a source of information independent of institutional knowledge*
Issue *Implementation time, synchronization*
Issue *Migration factors*
HubSpot
Left Side Column
Clients (Partner's customers)
Flow, To-From Central Process: *Tech support (via HS)*
Flow, To-From Central Process: *Product use*
Flow, To-From Central Process: *Interaction with Partner Success (based on level)*
Partners (application users)
Issue *Support for Partner selling programs is in Partner Success, should it be a separate function?*
Flow, To-From Central Process: *Tech Support (via HS)*
Flow, To-From Central Process: *Interactions with Partner Success, others*
Note *Kajabi for courses, Chargebee for billing*
Partner Recruitment (Sales)
Goal *Automated workflows throughout stage in funnel*

Goal *More automated data inputs (full to all systems)*	
Note *Sales = recruiting new partners*	
Note *Work in progress spreadsheet of subscription packages, used to add information to Chargebee*	
Flow, To-From Central Process: *New Opportunties*	
Flow, To-From Central Process: *Deal Nurture Sequence (Data)*	
Note *Prompts, nudges, sales rep accountability, etc.*	
Note *Email templates, collateral*	
Flow, To-From Central Process: *Closed-Won*	
Flow, To-From Central Process: *Subscription Plan, Account Details*	
Note *Extended packages, number of people/users, new contacts per person, add to email list*	
Website	
Flow, To Central Process: *New Opportunities*	
Product Management	
Note *Are partners using the product effectively?*	
Note *Requests passed through from Tech Support are viewed against Roadmap*	
Flow, To Central Process: *Prioritized Requests to Engineering*	
Marketing	
Issue *Where do campaigns link to, where are the landing pages, where is billing captured?*	
Note *Alternatives: Website, Hubspot, Kajabi*	
Kajabi	
Issue *Can learning system knowledge base be in Hubspot?*	
Note *Kajabi requires consultant login, KB on HS is public*	
Note *For use in marketing campaigns*	
Note *Learning system, platform for course material*	
Flow, To-From Central Process: *On boarding (for courses)*	
Note *Based on Subscription Level*	
Note *Currently Manual*	
Flow, From Central Process: *Subscription Plan details (from Chargebee)*	
Zero (Accounting Package)	
Flow, From Central Process: *Account Update from ChargeBee*	
ChargeBee	
Note *Subscription Management*	
Note *1. Verbal confirmation in HS; 2. HS data to Chargebee (triggered); 3. Manual entry of SBSC into Chargebee; 4. On invoice payment, marked as Closed-Won in HS*	
Note *Synced with Chargebee (?? must be another system)*	
Flow, To-From Central Process: *New Subscription Plan Details*	
Note *In the current model, this interface must be manual*	
Flow, To-From Central Process: *Subscription Changes*	
Flow, To-From Central Process: *One time charges (from Partner Support)*	
XYZ Co Application	
Change Idea *Need ability to easily add team members*	
Note *To add, partners need to go to admin page to add "slot", then add member*	
Flow, To-From Central Process: *Onboarding*	
Flow, To-From Central Process: *Demo Access (should stop happening)*	
Note *Service Sandbox / Should stop happening*	

Note *Triggered by Closed-Won*	

Office Operations & Finance

Slack (for messaging)

Right Side Column

Partner Success

Issue *Where to show relationships between XYZ Co app users (partners) and their clients (end clients)?*

   Note *Important for relationship management of consulting sales, crediting consultants, etc.*

   Goal *Ensure knowledge of partners experience journey*

   Note *Open rates from Chargebee*

   Note *Course completion events, participation from Kajabi and platform*

Issue *What to do about partners that have multiple team members?*

Goal *Need clarity on partner account ownership, captured in On-boarding, can be modified*

Goal *Maximizing/optimizing notification (triggers, automated) in the workflows*

Flow, From Central Process: *Notification on verbal "win"*

Flow, From Central Process: *Notice of new customer (on closed-won)*

   Note *Currently shared verbally from Closed-Won state; this is useful for advance notice planning*

   Note *Triggered by completion of the cycle with Chargebee*

Flow, To Central Process: *On boarding action (to other systems)*

Flow, To-From Central Process: *Customer support conversation notes*

Flow, To-From Central Process: *Email views with Gmail*

Flow, To Central Process: *Internal Community Marketing campaign info*

Flow, To Central Process: *Updates to Chargebee for Subscription Changes*

Flow, To Central Process: *One time charges (to Chargebee)*

Flow, To-From Central Process: *Partner utilization of product*

   Note *From the product, and from Kajabi*

Flow, To-From Central Process: *Retirement/Offboarding*

Flow, To-From Central Process: *Certification Status (tracking)*

Tech Support (distinct from Partner Success)

Issue *How to know which consultant (partner) is associated with a tech support request from a client (end user)*

   Note *Currently no reporting on tech requestor / consultant relationship*

   Note *Platform does not handle that relationship*

Change Idea *Track tech tickets to back to consultants, look for opportunities to improve consultants activities*

Flow, To-From Central Process: *Communication with requestor*

   Note *Written material (emails) captured in HS*

Flow, To-From Central Process: *Tech Support Request Notes (to HS)*

Flow, To-From Central Process: *Handoffs between Partner Success and Tech Support*

Flow, To Central Process: *Elevation to Product Management*

Flow, To-From Central Process: *Access to Knowledge Base (future)*

Community Platform (Hive)

   Note *Knowedge Base for Partners (future)*

Flow, To-From Central Process: *On boarding*

   Note *Depending on subscription plan level*

Flow, To-From Central Process: *Access by Others in Ecosystem*	
Note *Partner Success, Partners (not clients)*	
Knowledge Base (public facing)(future)	
Issue *Should this connect to Kajabi, to not have two sources (redundant)*	
Issue *Should KB be fully open, by subscription, other?*	
Note *Future - In Hubspot*	
Note *"If these questions, look at these articles"*	
Note *If these questions, look at these articles*	
Engineering	
Flow, To-From Central Process: *Interactions with Product Mangement*	
Looker	
G-Suite (email, drive, calendar)	