Flywheel Strategic
Sales & Marketing Digital Health Check

What is a Sales & Marketing Digital Health Check?

Do you feel your sales and marketing processes are not yielding the expected results? A thorough evaluation of your systems is crucial to ensure alignment with business goals, seamless operation, and maximized returns.

We have extensive expertise in auditing Sales & Marketing systems, including CRM (Customer Relationship Management), CDP (Customer Data Platform) and marketing automation tools. We provide insights into their functioning, alignment, integrations and efficiency.

Undergoing a Sales & Marketing Systems Health Check will enable you to recognize your robust areas and pinpoint vulnerabilities.

Ask us about all of our Health Check services:

- ✔ Digital Experience
- ✔ Ecommerce
- ✔ Portals (Intranet/Extranet)
- ✔ Digital Operations
- ✔ Sitefinity Optimization

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Sales & Marketing Strategy Analysis

Purpose Identification

We will assess the underlying goals and aims behind your Sales & Marketing strategies. This will shape of the health check, towards your desired business results.

Stakeholder Engagement

We'll converse with teams involved in using the tools - extracting insights from their daily routine will spotlight critical moments requiring attention.

Tools & Systems Examination

Functional Analysis

A thorough review of your tools (i.e. CRM, CDP, Email Marketing, etc.) will capture the functionalities you use to determine if they're optimized for your business needs.

Infrastructure & Integration Analysis

System Architecture

Flywheel will review your current system setup, discussing with your IT team or through direct access, ensuring an efficient and resilient architecture.

Data Storage & Integration Audit

Data is the backbone of Sales & Marketing and related systems. We'll assess where and how your data is stored, ensuring safety, accessibility, and optimal performance.

Flywheel Best Practices

Applied Wisdom

Standard protocols are one thing, but our hands-on experience provides a goldmine of insights. Well analyse your processes against the tools for maximum benefit.

Summary of Key Discoveries & Suggestions

Detailed Findings

Our audit will result in a comprehensive list of observations, highlighting strengths and areas of improvement, structured for easy reference.

Recommendations Document

We'll convert our findings into a detailed report, enriched with actionable advice and strategies to enhance system performance.

Summary Discussion

The discoveries and recommendations will be concisely presented to your team, followed by an in-depth conversation to ensure clarity and alignment.