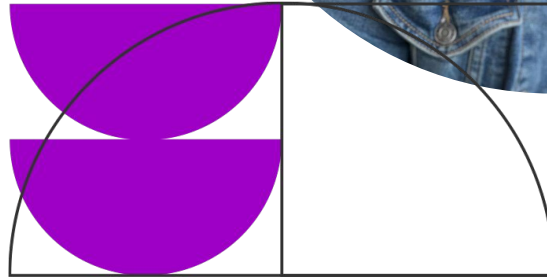# How to Create Process Out of CRM Chaos

Phil Hill

Phil Hill

Associate Manager, Retention Marketing, DoorDash

- Plant Lover
- Fantasy Football Obsessed
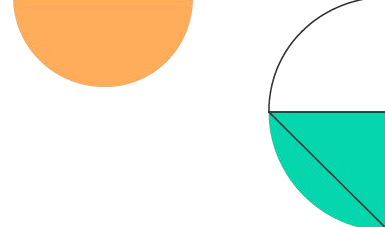- Road Biker

Agenda

01	Benefits of Process
02	Need of Process
03	Love of Process
04	Create a Process
05	Example Process
06	Q&A
07	Final Thoughts

What are the benefits of process?

Save yourself

- Your process is an extension of you
- Allow your team to work without you
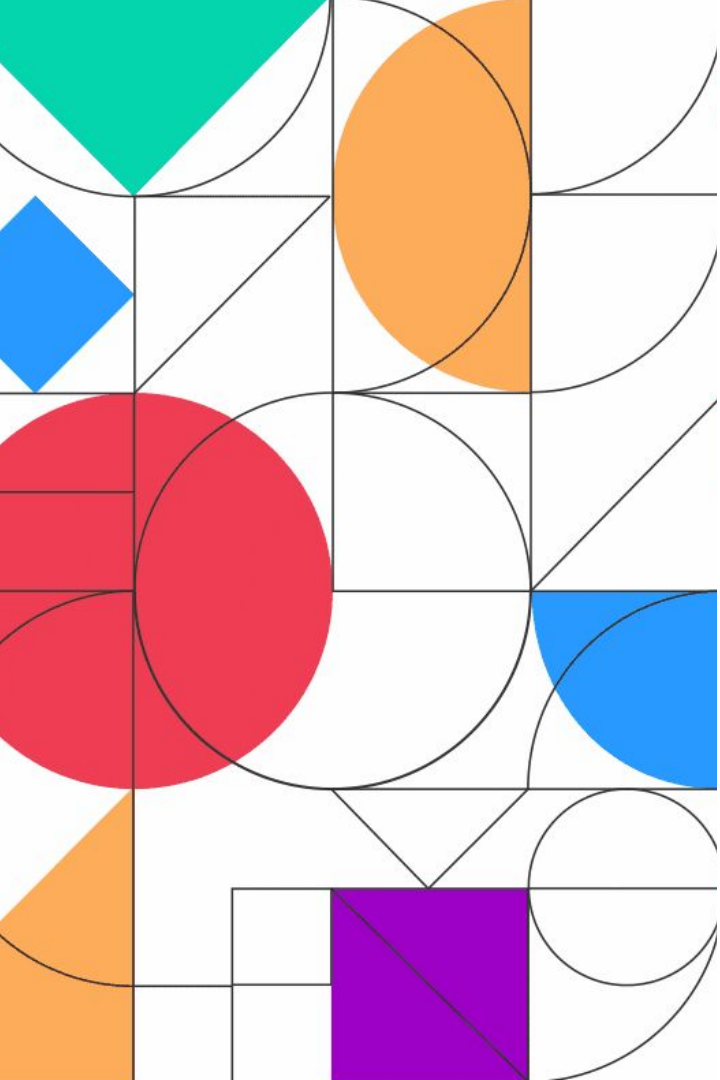
Save your time

- Be as efficient as possible with time
- Skip figuring how and what to do each time

Save your mind

- Stop forgetting to do routine tasks
- Stop double, triple checking that you did everything
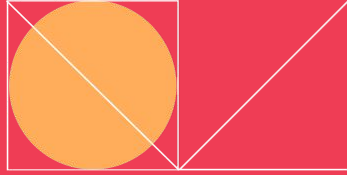
When do you need process?

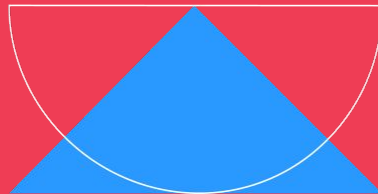"**Ugh, how did we miss a third copy error this month?** - You

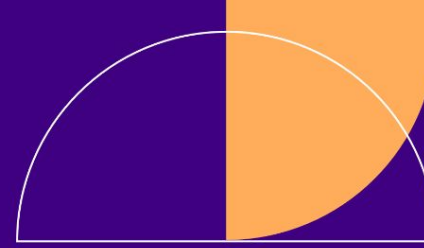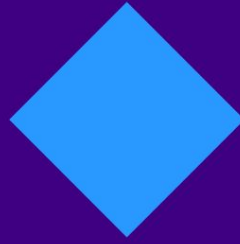"**Why does it take so long to send just one email?**" - Your partners
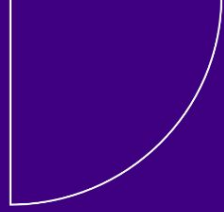
"**Don't forget the monthly update needs to be sent this week.**" - Your boss
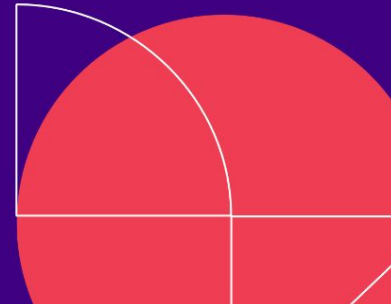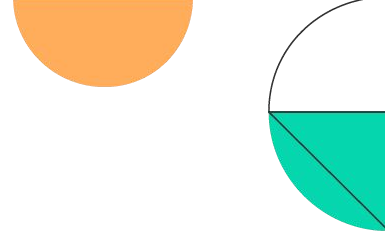
STOP!

Who loves process?

You

- You're going to have peace of mind

- You'll be more confident in your work

Your Team

- Your team will see your value

- Your team will be able to do more

Your Partners

- Your partners will have realistic expectations

- Your partners will know exactly how to support you on their projects

How do you create a process?

1. Gather Stakeholders

Call a meeting or find a way to get input from all stakeholders involved.

2. Identify Tasks

Identify and create a list of all tasks in the specific process.

3. Assign Roles (RACI)

Work with stakeholders to identify the best role/person to complete each task and SLAs.

4. Recruit Champions

Get others outside of you to encourage everyone to adopt the new process.

5. Document Process

Everything in steps 2 and 3 should be captured for future reference and sharing.

6. Rollout & Monitor

Notify stakeholders and monitor the new process. Welcome feedback!

Example of a process

1 Gather Stakeholders

Creative team, CRM team, cross functional partners making requests (Product, Accounting/Finance, New Business)

2 Identify Tasks

1. Make a detailed request to CRM (what are the details?) 2. Prioritize and add to calendar 3. Creative build 4. CRM build 5. Analyze

3 Assign Roles (RACI)

1. Cross functional partner 2. CRM (2 days) 3. Creative team (8 days) 4. CRM (4 days) 5. CRM (3 days after complete)

4 Recruit Champions

You, CRM manager, Product Manager, Creative Manager

5 Document Process

Everything in steps 2 and 3 should be captured for future reference and sharing.

6 Rollout & Monitor

Notify stakeholders from step 1 of the new intake process. Monitor how smooth the new process is working. Provide a work doc to capture feedback.

Where do you get started with process?

Intake

Do you need to get information for deliverables that you are responsible or partially responsible for delivering but are not initiating the request?

Ex: Product launch email request from product team Intake form

To-do list

Are there multiple task that you and/or team need to complete on a regular basis that can be for different projects?

Ex: You send emails out and need to ensure that they are errors free. QA process

Cross-functional

Do you and several other teams work together to produce a deliverable? You each have your own process and you can initiate making the all work together.

Ex: Emergency response is needed. The teams involved are Cx, CRM, Creative, Legal. Cross-functional Process RACI
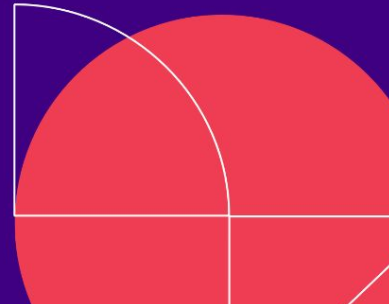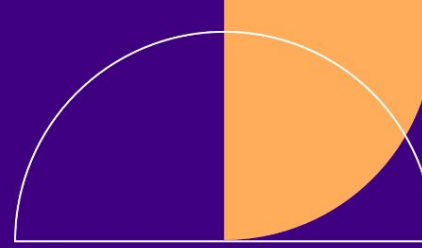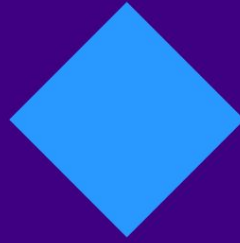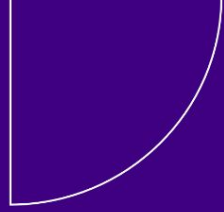
Q&A

Final thoughts

A Few Housekeeping Items

- Submit your session feedback in the mobile app by selecting this session and then click on **feedback** at the bottom. **Rate the session and click post your feedback**!

- All session recordings will be available at the end of September on iterable.com/activate

- Continue the conversation on social using **#Activate22**

- PSSST: some sessions will have QR codes to scan and earn points towards the raffle. **Keep your eyes peeled!**