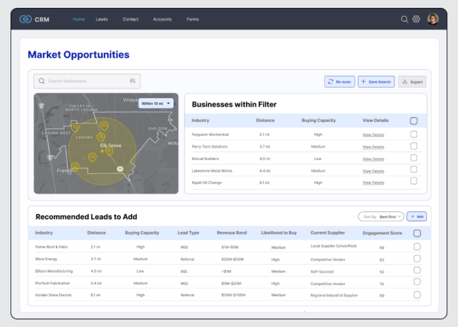
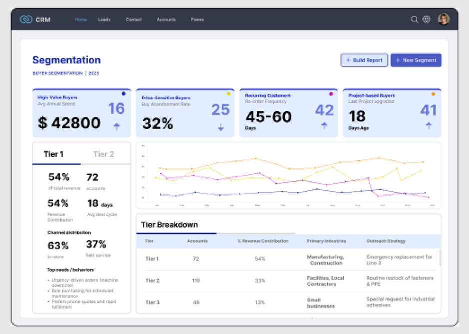
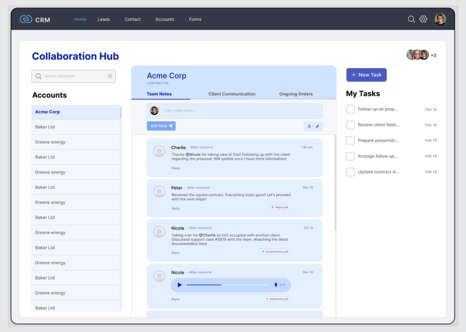
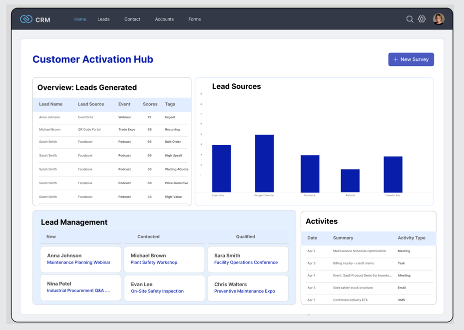
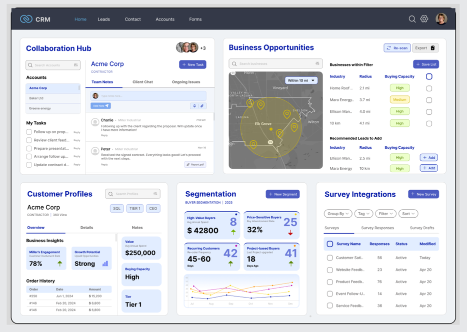
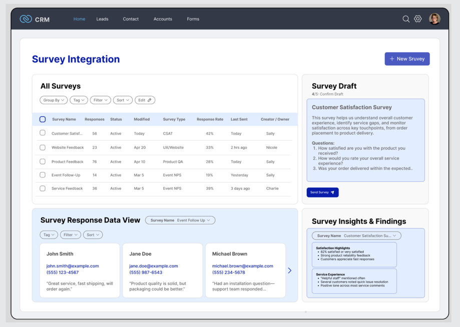
Assist: CRM integration

This service blueprint focuses on the internal role (the Director of Customer Experience and Outcomes) that turns leads into long-term clients.

		GET STARTED	DISCOVER & UNDERSTAND	PREP & CUSTOMIZATION	ENGAGE & GUIDE	ONBOARD & FEEDBACK	MAINTAIN RELATIONSHIP
What guides Director of Customer Experience and Outcome's decisions?	Goals	Gain Potential leads Prioritize leads Improve communication resources	Understand customer operations and challenges Detailed data gathering Event assets and customization	In-person evaluation Eventing planning through resources	Hook interest for the companies event/service Turn interest into active engagement Turn Active participation into initial onboarding	Onboarding and finalize account Activate customer engagement into service	Maintain active purchasing
	Drivers	Expand into different markets; more business growth Cater event outreach for high value clients Help identify roles for customers to get in touch with	Strategized market capture and network generation Enables personalization of understanding that sets the company apart	Deeper understanding of the lead and catering custom engagement via event interactions	Target service personalization for customers for better and enhanced outputs	Incorporate need changes from customer	Stability and predictability of business services
KEY INTERFACES *Summary*		**LEAD GENERATION HUB** *Getting the right prospects into the company's landscape*	**CUSTOMER INSIGHT HUB** *Understanding customer operations so that the company has clarity when serving potential customers*	**PREPARATION HUB** *Turning customer insights into customized events and planned engagement experiences*	**CUSTOMER ACTIVATION HUB** *Guiding customers from interest to action and strengthening the relationship*	**ACCOUNT MANAGEMENT HUB** *ensures that account are proactive to what customers are actually telling the business through their behavior and their feedback.*	**MAINTAIN HUB** *Supports customers after the initial sale, keeping relationships active, informed, and reliable.*
KEY CAPABILITIES	High → Low	Create potential prospects based on current purchasing patterns Locally segment prospects by industry and company's engagement Track contact details and roles in companies Assess a prospect's buying capacity Integrate data from floor staff who spoke to lead containing information & details about the referral Classify each lead type to guide personalized pathways Support decisions with market-backed data	Produce brief overview report about lead and the industry Provide and list customer pains and key operations Capture recurring themes across similar customers in industry trends Provide template for conversation (questions asked, prioritized on urgency Know what service the company can provide them Tag urgency, severity, or complexity of customer gaps Identify market opportunity	Provide knowledge to customer Ability to market event tailored to customers Capture data and integrate with other qualitative data	Match potential customers to vendors based on predictable customer segmentation reports Capture real-time lead insights at the booth Log lead details instantly during conversation Sync all event-generated leads into Activation hub Provide a structured qualification template for event interactions	Generate customer specific contract Automatically feed responses, linking each submission to the correct customer or lead profile	Unify history from sales, support, and operations Predict purchasing patterns to make suggestions for next purchase
KEY FEATURES (SOFTWARE)	Customer Relationship & Engagement	**Customer Segmentation & Personas:** Grouping based on behaviors value tiers	**Customer Segmentation:** Grouping based on behaviors, value tiers, revenue contributed **Alignment report:** Shareable summary of customer needs with build-in feedback to confirm understand	**Omni channel Communication:** Integrated messaging (email, chat, phone, SMS, Social) in one platform **Marketing Automation:** Shareable summary of upcoming event linked to Eventbrite	**Event Mode Lead Capture Form:** simplified high-speed feature that includes name, contact, buying capacity, needs **QR Capture:** pulls data into the lead profile to avoid manual typing	**Customer 360 profile:** Unified view of customer data across touchpoints (industry, size, role, preferences). **Customer 360 profile:** Unified view of customer data across touchpoints (industry, size, role, preferences). **Customizable Templates:** Supports branded survey builders with configurable question types, logic branching, rating scales, and conditional follow-ups.	**Customer Lifetime Value (CLV) Metrics:** Financial and behavioral data to inform retention strategy
	Experience Insight & Analysis	**Engagement Score:** Likeliness to engage based on their industry/market	**Data capture & Reporting Builder:** Create and share custom analytics stories with leads.				
	Operational & Team Collaboration	**Floor Insights Capture:** referral details and notes submitted by floor staff		**Collaboration Hub/Note Sharing:** Internal communication about customer cases or key accounts			
	Predictive & Integrative	**Market opportunity Scanner:** Finds businesses within a set distance from your store					**Predictive Purchase Modeling:** Analyzes history customer data to forecast future purchases.
	Prototype						
BENEFIT TO THE BUSINESS		Dedicate target efforts to the most promising leads Lowers time spent on low-value leads and increases conversion likelihood. Improves resource allocation	Increase customer acquisition and network Strengthen future leads	Added prepared notes and planning Curate customized experiences	Execute aligned service to gain trust Faster buy-in from experiencing services in-person Initiate relationship building for long term	Gain a new customer. Boost sale growth Strengthen relation via continued improvement	Relationship retention and growth
OPERATIONAL SUPPORT (BACKEND)		Uses CRM to review leads through website visits, referrals, inquiry, phone calls, etc. Runs analysis on lead data Score the lead based on metrics	Scheduling a call with lead including setting alerts and reminders Detailed note taking and generation Preparation and setting up for in-person visit Internal collaboration within the company's team to prepare relevant event materials for marketing and awareness	Schedule and finalize sit visit to lead's facility on calendar Prepare event customization invites for leads and customers Build a tailor-made experience for attendees with tags for booths and demos relevant to them	Using the customer 360 profile, study in-depth about the lead's required needs and services Prepare a list of suggestions and top 5 go-to matching lead's needs and vendor capabilities	Prepare contract and other documents for customer onboarding Setting up access for account and co-view	
LINE OF VISIBILITY							
CUSTOMER FACING INTERACTIONS (FRONTEND)		Contact the lead or respond to potential interests	Gets on call with the lead for an exploratory interview Explains upcoming event and its relevance to the lead's needs and challenges Creates and sends a personalized follow-up message Shares interactive report for feedback and alignment Offers to schedule possible dates for on-site visit to their facility Sends notification for the upcoming event	On-site visit: Walk through the lead's facility and collect data of processes Sends invitation for upcoming event through marketing automation	Guide customer to vendors and suppliers based on the lead's preferences Encourage and facilitate engagement between vendors and lead attendees Offer them to take a look at the customer 360 co-view for approval and get the go-ahead on contracts/deals.	Help lead to the company's sign up Complete proper account creation and setting details Run and orient the customer through the features and functions for their engagement	Regular check-ins and correspondence with customer, keeping up to date with their needs and business changes
LINE OF INTERACTION							
CUSTOMER ACTION		Searches for MRO vendors for alternative or multiple quotations Responds and agrees for a phone call	Takes an intro "get-to-know the company"meeting Reviews report and sends back relevant feedback. Receives event information	Inform the company about business operations Receives tailor-made event invitation materials Register for the event	Attends the event hosted by the company (Workshop, community hosting events, etc.) Holds conversation with vendor that aligns with needs/services Interested in the company's services. Agrees to start onboarding procedure Scans QR Code	Becomes an active account customer Sign contract specific vendors and facilities Shares information, details, and updates with team at their own company.	Continues in business relationship through active feedback and requirement updates with the help of CRM interaction capabilities