The Workflow Academy's 3 Pillars of Smart Architecture

Pillar 1: We Obsessively Find Bottlenecks in the Customer Lifecycle (Through Detailed Questions & Active Listening)

In order to be effective at solving problems, there needs to be an understanding of how they make money and what their internal processes are supposed to be. In a lot of ways, this can be a deep dive into how their business would operate in their perfect world. Then you use that template to match against how you understand their business is currently running - this will help you identify problems.

- **Helpful Tips**:
  - Genuinely care about the business you are meeting with. Not only will it go a long way toward building a positive relationship with your clients, but it will urge you to be more invested in the project and produce good work.
  - The majority of a needs analysis is about finding answers to critical questions that will help you understand the extent of their needs and their urgency. Keep a comprehensive list of good questions handy, but don't feel the need to systematically go through them one-by-one. This is first and foremost a back and forth conversation. A lot of your questions will be follow-ups which prod for more information while you take notes.
  - Record the meeting so that you can take more extensive notes as you watch back the conversation later. in a conversation with a client, it can be hard to keep your attention both on the client and on your notes. So while you talk with a client, make broad, high level notes, then worry about the extensive details, later.
- **Active Listening**: Be humble enough to be comfortable with being the dumbest person in the room. Ask lots of questions, and clarify the responses - "I'm going to repeat back what I'm hearing to make sure that I'm understanding". This helps them feel understood and reassures them that you fully comprehend the problem. Generally, the flow of conversation will follow the following format:
  - Question
  - Answer (from client)

    - Confirm Understanding of the Answer
    - Follow-up Questions (if applicable)
- **Objectives**:
    - Understand their business model
    - Understand their current internal processes
    - Come away with an understanding between you and the client regarding what their most pressing needs are.
    - Build initial planning and outlining documents
- **Questions to be answered**:
    - How do they make money?
    - Who is their primary customer base?
    - What does their current CRM setup and its surrounding processes look like?
    - Which of the following needs the most improvement?
        - CRM Administration
        - Revenue Operations
        - Sales Operations
        - Marketing Operations
        - Customer Success
    - What are the most pressing pain points they are facing? What is standing in the way of closing more deals?
    - How pressing are their needs? Will they implode if their CRM is not fixed this week (which won't happen) or do they have things together enough to wait a few months?
- **Deliverables**:
    - Initial System outline summarizing of pain points
    - Basic flowchart of their ideal customer journey
    - Compile a wish-list of system capabilities
    - Order and prioritize their pain points from most to least pressing.

Pillar 2: We Align Revenue Operations Through Outlines, Plans, and Flowcharts

Match their vision for their ideal system against their existing CRM and surrounding processes to determine what is keeping them from achieving their ideal business model. The strategy, here, is Active Planning:

- **Active Planning:** Continued communication with your client as you are planning.

Get their thoughts & feedback as you propose solutions. We like to live by the phrase "measure twice, cut once". It is much better to spend additional time planning and testing than to spend even more time fixing mistakes.

- **Objectives**:
    - Settle on the solutions to the outlined problems.
    - Complete final planning documents
    - Make sure you and your client are on the same page in terms of the scope of the project and how long you estimate it will take
    - Measure twice before we begin cutting in the next phase
- **Questions to be answered**:
    - Can you identify the source(s) of their pain and suffering?
        - Something process oriented?
        - Poor Data integrity?
        - Poor organization?
        - Too many tedious tasks, sucking up everyone's time? (i.e. Do they need more automation?)
        - Poor Reporting?
    - Do you have a solution which could address the problem(s) placed in front of you?
    - Are there any quality of life improvements to the CRM that you could suggest? *(Remember: Dont be an order taker. Often people don't know what they want until you show it to them.)*
    - Organize and prioritize features from most urgent to least:
    - How does a fix or feature affect budget, time, and scope?
        - Is the value/necessity of a given feature justified by the amount of time needed to implement it?
        - Remember, users will only take advantage of the CRM if it makes their job easier. That being said, ask yourself: Will the addition of a feature be something that will improve the productivity of the people working there, or will it end up being just another tedious, button clicking task?
    - Do you know any co-workers/peers whose input about a solution would be valuable?
    - Are you getting a little overzealous with the amount of automation in your system plan? (we find it's smart to layer in automation incrementally as people use the system over the course of a few months)
- **Deliverables**:

    - Completed System Plan
        - Full system flowchart
        - Statement of work, detailing every field, module, workflow rule, blueprint, etc. included in your system plan
    - Final review and go-ahead from your client

Pillar 3: We Solve Revenue Operations Problems By Building and Implementing (No-Code) Software

Now it's time to build. Be sure you are communicating with the client regularly and updating them as things get built. Some things to keep in mind to help building a CRM run smoothly:

- **Use Your Resources**:
    - Testing, Testing, Testing! Run records through everything that you create. Even with a lot of planning, it's easy to miss a small issue here and there that you hadn't considered.
    - There is a sandbox feature for you to take advantage of if you want to push any new implementations live all at once. Utilizing the sandbox also helps mitigate the risk of messing something up as you will have time to test things in a practice environment prior to full implementation.
    - Connect with other people in the CRM industry. It is growing quickly and so is its community, user base, and workforce and they are all learning new ways to get around problems. Take advantage of collective knowledge rather than relying solely on your own.
    - Be motivated to learn new things. There is a wealth of knowledge out there (Udemy, Masterclass, Udacity, SkillShare, WFA Courses, Books) for those willing to put in the time to learn. We promise it will pay dividends a hundred times over throughout your career.
- **Questions**:
    - Do you need any help with the implementation of anything? Are you second guessing your solutions to any problems? If so, don't be afraid to ask for some help or input from others.
    - Is there any data clean-up or re-organizing that needs to happen prior to getting started?
    - How does each feature affect existing data and workflows? Double check to make sure you won't create any problems.
- **Objectives & Deliverables**:
    - Completed System

- Gather user feedback & make adjustments as needed.