CRM Best Practices

> *Luiz Milanezi is the Operations Manager LATAM at StarkCloud. With more than 20 years of experience in IT infrastructure and operations management, he has led data center and mission-critical systems projects, with a focus on implementing and optimizing ERP, including SAP B1 and financial systems and Cloud Computing architectures. His track record spans key roles at Ativy, Sinestec, and Watchtower Bible and Tract Society, backed by solid training in IT leadership and management.*

Background

When I joined the company in 2023, one of my core responsibilities was migrating commercial operations from the Hubspot CRM to Creatio, extending its use across the entire company to cover demand generation, sales, administration, and support. I soon ran into the challenge of establishing a solid framework of policies, procedures, and controls to ensure efficiency, transparency, and data quality. That foundation was critical to advancing workflow automation and unlocking the value in our data. In short, we needed to pair this technology with the right enterprise governance framework.

Solution

With Imppulsor’s support, we designed and implemented a robust framework of policies, procedures, and controls to accelerate adoption of Creatio, our new CRM. We set clear guidelines for system use, developed detailed procedures for its integration, and put controls in place to ensure an effective transition and sound data management.

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Working with Imppulsor helped us put measures in place to ensure efficiency, transpar
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Source: https://imppulsor.com/casos-de-exito/crm-best-practices/