

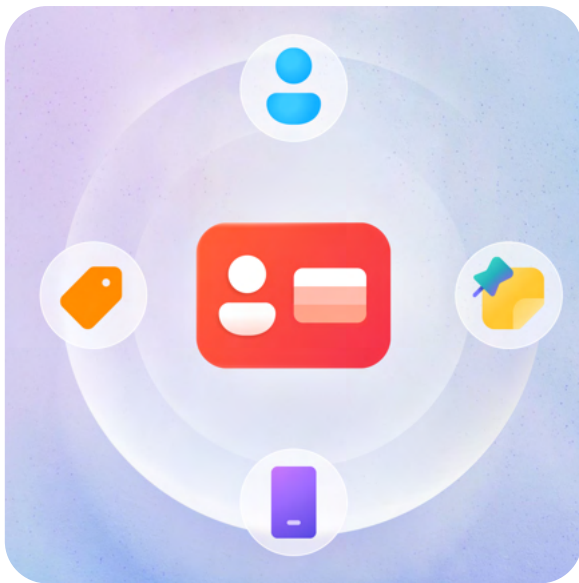
eWay-CRM Adoption Framework

Getting teams to adopt a CRM isn't easy – but it can be. Follow our proven step-by-step guide.

Backed by 20 years of experience.

Step 1: Build a Digital Rolodex

Stop searching for contacts. Start working with them.



★ Benefits

- Stop asking around for phone numbers or email addresses.
- Stop digging through personal inboxes.
- Stop relying on one colleague who “knows the customer”.

🏆 What you get

Centralized Contacts

All customers and companies in one shared, organized database.

Shared Access Across the Team

Contacts available in Outlook, on mobile, and across departments.

Automation (Assisted Data Capture)

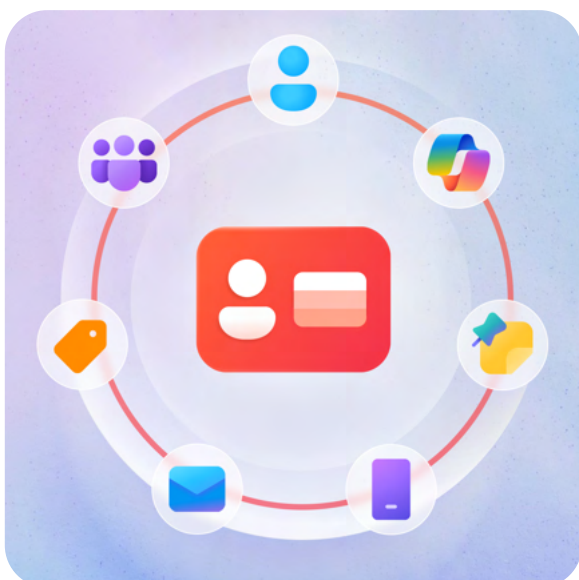
New contacts are suggested by AI and can be created quickly from emails, reducing manual entry.

Customer Responsibility

Clear ownership of contact data, so information stays reliable.

Step 2: Share Communications

Know every customer conversation without asking anyone.



★ Benefits

- No repeating the same information to clients.
- No guessing what was already said.
- Anyone can step into a conversation with full context.

🏆 What you get

Shared Communication

Emails, meetings, and notes automatically linked to contacts and companies.

Smooth Collaboration

Shared visibility into customer communication across the team.

Interaction Timeline

A complete history of emails, meetings, and notes for each customer.

CRM that Lives Inside Microsoft 365

Work with emails, meetings, and Teams conversations directly inside Outlook and Microsoft 365.

Step 3: Add Deals and Projects

See your pipeline clearly. Deliver without surprises.



★ Benefits

- See all deals and projects in one place.
- Know who owns what, what's happening, and what comes next.
- Understand your pipeline and expected revenue at any time.

🏆 What you get

Order in Sales and Delivery

All sales deals and delivery projects structured, owned, and linked to customers.

Connected Communication

Emails, tasks, and documents attached directly to each deal or project.

Process Alignment

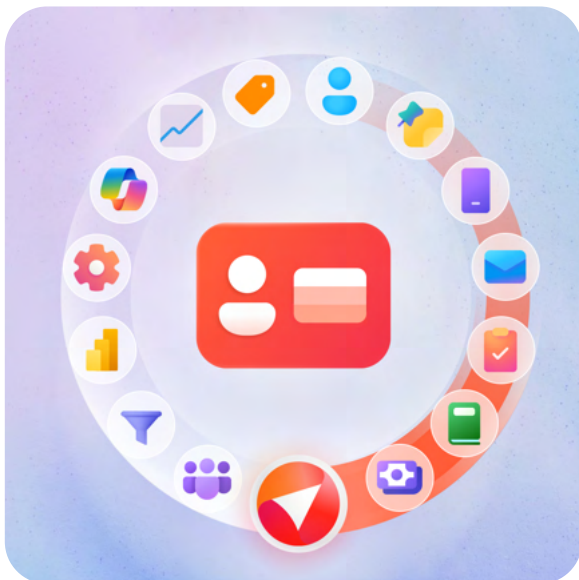
Defined steps from sales to delivery, with clear responsibilities.

Sales Reporting

Pipeline visibility, revenue forecasts, and activity insights for managers.

Step 4: Get 360° View & Automation

Run your business on data, not guesswork.



★ Benefits

- Predictable and auditable revenue.
- Less dependency on individual employees and memory.
- Consistent execution as the company grows.

🏆 What you get

360° Customer View

Combined CRM and ERP data in one place.

Tied to Your Needs

Role-based views, forms, and workflows tailored to how each team works.

Complex Reporting

Cross-system dashboards for sales, finance, and operational decision-making.

Sales and Delivery Automation

Tasks, reminders, and handoffs triggered automatically based on real data.

Governance

Enforced processes and data rules that keep work consistent as the company scales.

Where are you today?

Tell us how your team works today. We will show you your next step.

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