CLOUD ANVIL

CRM ASSESSMENT CASE STUDY

An operational CRM.
Hidden risks.
A clear improvement plan.

AN AUSTRALIAN NOT-FOR-PROFIT

Anonymised client engagement

THE CONTEXT

A sound platform.
A need for stronger controls.

An Australian not-for-profit organisation engaged Cloud Anvil to independently assess an established marketing CRM environment. The objective was to validate the configuration, understand operational maturity and prioritise improvements.

Campaigns were running, customer journeys were established and the CRM integration was reliable. The assessment found no systemic platform failure requiring a major redesign.

The opportunity was to strengthen the way the platform was governed and operated, building on a capable technical foundation.

WHAT WE REVIEWED

Configuration analysis, technical validation, stakeholder workshops and production evidence informed the assessment across ten capability domains.

Customer data and identity; automation and journeys; audience and consent management; content; reporting; deliverability; security; integrations; platform configuration; and operational governance.

The review identified both established strengths and specific control gaps, giving the organisation a balanced basis for its next investment decisions.

THE FINDINGS

What day-to-day activity did not reveal

01 Reporting needed closer scrutiny

Automated link scanning distorted engagement metrics in a reviewed campaign. Some reporting processes were inactive or unreliable, limiting confidence in the information available to the team.

02 Customer identity needed stronger controls

Inconsistent identifiers and incomplete deduplication controls complicated customer records. Consent and suppression arrangements also needed clarification and stronger shared governance.

03 Critical processes depended on undocumented knowledge

A complex automation lacked documentation, while some recurring processes had no failure notifications. These gaps increased maintenance and handover dependency.

04 Access and change controls needed attention

The review identified account lifecycle, authentication and change-documentation improvements, supported by a recurring programme of platform checks.

THE ROADMAP & OUTCOME

Clear priorities.
A practical next step.

7 **red-priority actions identified**

Including 4 requiring immediate action

The remaining priority work was staged across 30- and 60-day action windows, reflecting risk, dependencies and implementation effort.

WHAT THE TEAM RECEIVED

An evidence-based findings register, a documented maturity assessment and a prioritised roadmap. Recommendations included business impact, indicative effort, proposed responsibilities and action windows.

A recurring governance checklist provided a basis for ongoing oversight of access, automation, journeys, data and reporting.

The outcome was a clearer view of platform health and a practical plan for strengthening the existing environment. The engagement documented here was an assessment; subsequent remediation and performance gains are not claimed.

Understand what needs attention in your CRM.

Book a 30-minute CRM discussion