



Your CRM Agency

A systematized Customer Relationship Management is one of the decisive factors for the success of modern companies. A CRM forms the foundation for future-oriented growth and is therefore indispensable in the age of digitalization.

- ✓ **Cross-disciplinary expertise**
- ✓ **Long-term and continuous support**
- ✓ **Clear data requirements**

How do we work as a CRM agency?



kkvision can look back on many years of practical experience as a CRM agency. We have already supervised various customer projects and can flexibly respond to different company requirements. In addition, our well-coordinated team enables us to implement processes quickly and efficiently.

In the following, we would like to present two sample projects from our daily operations. This will give you a comprehensive overview of our expertise.

Implementation of Microsoft Dynamics for Interim Management

Initial Situation

Our client, a company in the field of interim management, was already using a CRM system. However, due to changing legal requirements in the financial sector, this system could no longer meet the new demands. The goal was to implement a targeted system within a short time frame. Until then, a temporary solution had to be set up so that the system could continue to operate without interruption. Complex workflows also had to be taken into account. There was no room for error here.

➔ Solution

kkvision set up a new system and successfully analyzed and implemented the customer's business processes. Data migration from the old system was carried out without data loss into the new CRM system. It was especially important to transfer the clean and consistent data. As a result, the company now has a system that significantly simplifies business processes. The interim management team can now work more efficiently, and the system is easier to maintain and expand by developers.

Interface Integration with the CRM System of an Insurance Consulting Firm

Initial Situation

Our client from the insurance consulting sector uses HubSpot as a CRM system. However, this system did not communicate with the internal administration system. As a result, the consultant had to maintain all data twice: once in HubSpot and once in the internal system – including address data, call notes, and acquisition processes. Not only was this time-consuming, but it also led to high error rates. The goal was to solve this problem sustainably.

➔ Solution

We developed an interface that seamlessly integrates the system landscape into HubSpot. All data relevant to the consulting process is now automatically synchronized. This eliminated manual effort and reduced error rates. The consultant now works with a central data foundation and can advise customers more effectively. The insurance consultant can also focus more on sales, as administrative tasks in the CRM system have been significantly reduced.

Benefits of Working with Us

Cross-Disciplinary Expertise

We are not just IT specialists and marketers, but also experts in business processes. In addition, we are highly experienced in the field of digitalization and its possibilities. Thanks to this exceptional combination, we don't just see the individual business process, but can create a comprehensive overall picture.

As a CRM agency, we can therefore offer an overarching connection between various departments and reflect your individual business requirements from a single source. This accelerates and optimizes the entire project – from the initial consultation to the final implementation.

Long-Term and Ongoing Support

For kkvvision, the successful implementation of a new CRM system does not mark the end of a business relationship, but rather the beginning. Long-term and intensive collaboration with our clients is a matter of course for us.

We ensure that your system receives long-term proper maintenance and service. It is further developed, expanded, and maintained. This way, you will enjoy your new system for a long time, and your investment will pay off.

Clear Data Requirements

With us, you will be able to clearly define the requirements for the data you want to extract and use from the system later on. In addition, you can be sure that all data is reliably and GDPR-compliantly implemented.

This Is How We Work



1. Analysis of the Status Quo

The first phase of a new customer project is characterized by close collaboration between our consultants and the new partner company. As part of this, we conduct an audit by analyzing the current situation of the respective company and reviewing ongoing business processes.

This allows us to create a comprehensive overview of the company's specific requirements, as well as identify existing opportunities and areas for improvement. This overall picture is then passed on to our architects.

2. Implementation

The implementation phase is driven by intensive collaboration between our consultants and architects. The former communicate the individual requirements of your company, upon which our architects begin the technical implementation.

In the technical implementation phase, the basic requirements are first implemented and data models are created. This is followed by specific processes, additional modules, and the integration of interfaces.

3. Ongoing Support

CRM solutions are constantly evolving. They must be adapted to company-specific, economic, technical, and legal changes. That's why we continue to support and assist our clients even after successful implementation.

Ongoing analysis, evaluation, and optimization of processes are just as important as ensuring compliance with legal requirements. In the context of digitalization, GDPR in particular plays a key role. Sensitive and confidential customer data must be protected and safeguarded from unauthorized access.

In addition, our support includes user and data maintenance as well as continuous application improvement.

What Our Clients Say About Us



kkvision provided us with world class knowledge and support. From ideation to launch, Team showed great professionalism and proactiveness. Thanks for amazing support!

SANDEEP SINGH

Senior Manager – Bunzl Holding



The team at kkvision consists of absolute professionals. The quick availability and the competent implementation of our requirements made collaboration significantly easier. Thank you for the support!

PHIL HEIMLICH

Managing Director – KG Media Factory GmbH



Luca Körner
CTO



Dimitar Mihaylov
ADMINISTRATOR &
DEVELOPER



Katharina Krug
CEO & FOUNDER



Sebastian Küstermann
CCO



Pratima Patil
ADMINISTRATOR &
CRM & AUTOMATION
MANAGER

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How much does a CRM cost?

The costs of a CRM system vary significantly from provider to provider. They also depend on your company's specific requirements, the complexity of the project, and the time factor. Therefore, it is difficult to provide a general estimate.

If you outsource implementation and support to a CRM agency, the agency's service fees are added. But it's not just about cost – in terms of performance, it is much more efficient and cost-effective to hire an agency than to manage the project internally.

Keep in mind: CRM projects are time- and labor-intensive. Qualified IT and marketing personnel are currently hard to find and in high demand. An agency, on the other hand, is immediately available to support you.

Is digitalization possible?

That depends entirely on your company, your target group, and your offerings. Your services matter. Today, many business processes across nearly every industry can be digitalized and automated – from sales and marketing to customer data management and document handling.

Which CRM software is right for me?

That depends entirely on your company, your target group, and your offerings. Your services matter. Today, many business processes across nearly every industry can be digitalized and automated – from sales and marketing to customer data management and document handling.

How does the collaboration work?

Our consultants begin by creating a comprehensive overview of your business processes and requirements. This overall picture is then passed on to our architects, who immediately begin with the technical implementation of the project.

From the very start, our project team maintains close communication with you to ensure the best possible execution of your project.

How is the project structured over time?

New projects are typically divided into three phases:

1. Analysis of the status quo

We learn about your requirements and business processes and create a comprehensive overview of your company's specific situation.

2. Implementation

We then translate this overview into technical terms. We design and program your CRM system, taking into account your company-specific processes and requirements, and aligning the system accordingly.

3. Ongoing support

A CRM project constantly evolves and requires ongoing maintenance and service. Business, economic, and legal changes also need to be continuously implemented. That's why we continue to support our clients even after successful implementation.