



The

General Manager's Guide To Selecting CRM

A Collier Pickard Publication

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In this eBook we'll cover:

- The primary benefits of CRM
- CRM Functionality
- Acquire, developing & retaining clients
- Marketing and CRM
- Sales and CRM
- Customer Services and CRM
- Selecting CRM for your business

But it's easy to get distracted during the research stage of a project, so if you need to cut to the chase at any point just click the Collier Pickard **symbol** to talk to our team.

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Customer Relationship Management

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If your organisation has recognised the need for a change in the way things are managed and is looking for the right way to go about it, then this guide is for you. Unlike some of our other guides it will concentrate not on strategy, but on the **operational elements of CRM**.

Managing every element of modern businesses demands specific **skills** and **tools**. In finance and administration these tools are well understood. Master's in Business Administration (MBA) degrees exemplify a scientific approach to management.

In Sales, Marketing and Customer Service these disciplines are less well understood. As a manager tasked with implementing control across these areas, CRM systems can offer you a suite of relevant tools.



Primary benefits of CRM Intro

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160 </table>
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163 </body>
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165 <!--
166 var currentImage = "bigImage1";
167 var pages = Math.ceil(photos.length / 9);
168 updatePages();
169 updateAllImages();
170 // document.getElementById("bigImage0").src = "images/wieksze/" + photos[jpage * 9];
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177     var html = '<table style="width: 330px;" cellspacing="0" cellpadding="0" border="0">';
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Before concentrating on the tools, it's worth identifying the **benefits** that most organisations seek when beginning a CRM project.

First, a bit of background. How you acquire, develop and retain customers is changing. Factors such as **technological innovation** and **liberalisation** of markets are driving the big changes. Customer expectation and increased access to information has changed how they want to buy. The net result is that **control has passed from the seller to the buyer**. This loss of understanding of the sales process has made revenue and profitability forecasting a dark art.

Faced with so many changes and challenges, organisations are desperate re-establish control.

Primary benefits of CRM Continued

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Any CRM system should deliver **information**. Information on which you can base business decisions. To do this, CRM needs to provide a **single, secure place to store data**. Data however is not information. So CRM needs to work with **data**. The way it works with the data is dictated by two elements. **People** and **Processes**. It is only when data has been brought together with people and processes can we call it information.

The final stage is the **use of information**. You use information when it is presented in a format, and at a time that allows you to take action. The key is that the actions you take should add more data to CRM and further improve the **quality** of information you have.

Benefits comes from features

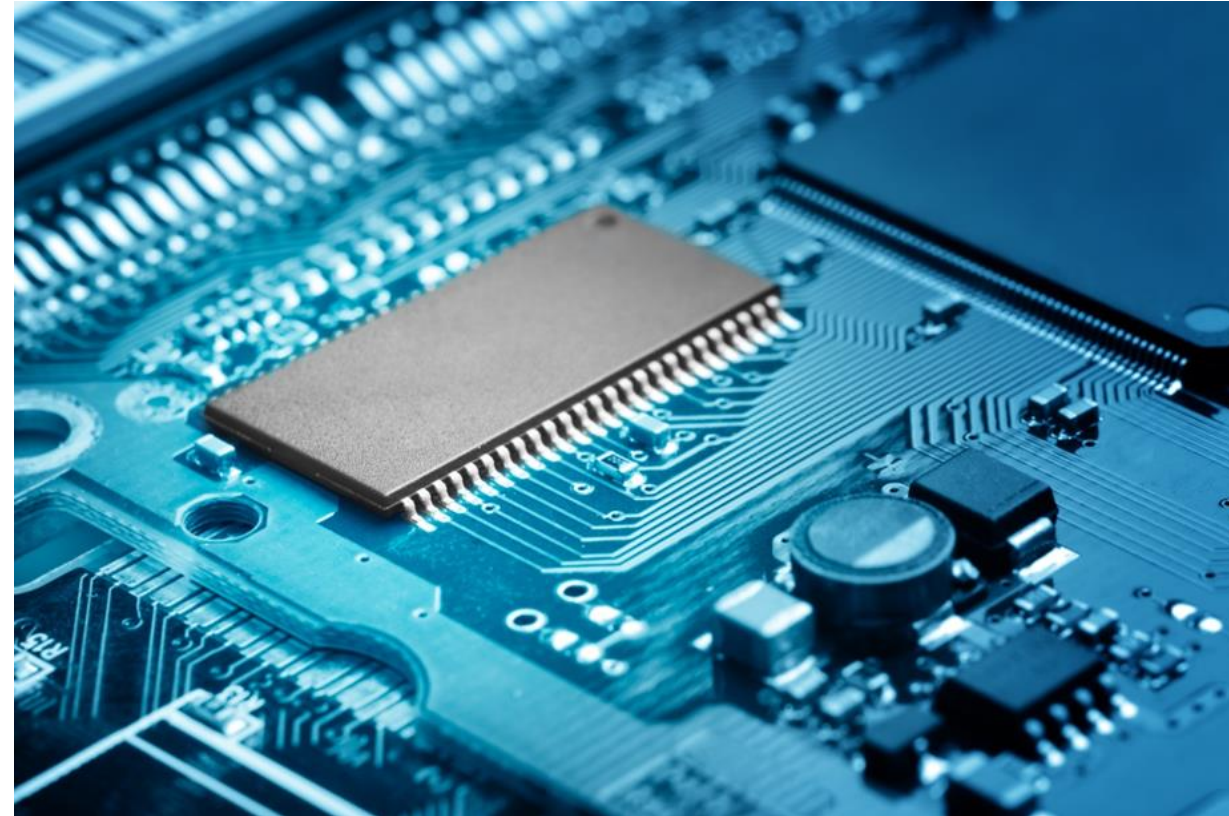
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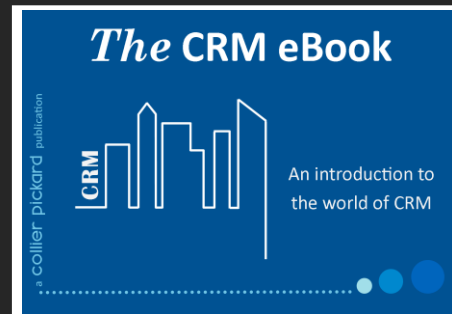
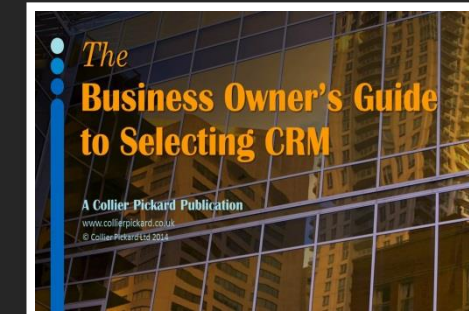
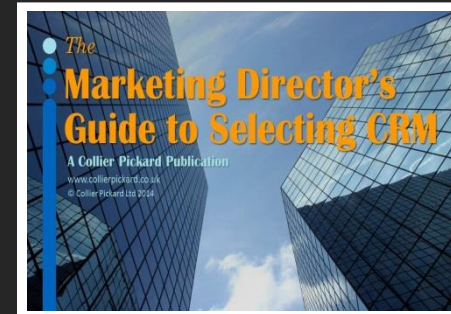
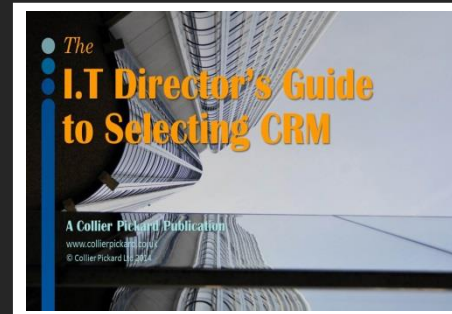
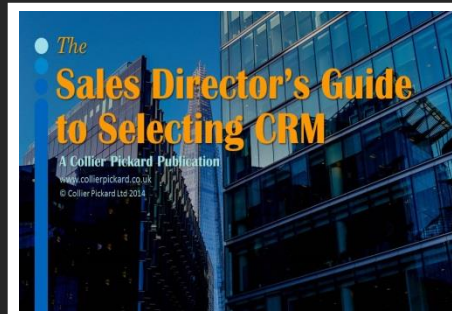


The creation of information and actionable insight from CRM data requires **software**. In software vendors' brochures they often describe features. Sadly, features alone do not automatically translate data into information.

They are however important, so we'll look at the main areas of **CRM functionality**. For each area of functionality we have highlighted some key considerations. You may also notice that these considerations are based on business decisions.

Selecting the **right set of features**, and the **right software** is always based on your broader business plan.





If you'd like some handy guides to help you communicate the message about CRM and guide your team we have a range of eBooks that can help – starting with *The CRM eBook* – What Works... What Doesn't.

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Acquire, Retain & Develop – Marketing, Sales, Customer Service



In most businesses today, **caring for the customer** is everyone's responsibility. The old ways of doing business are thankfully passing into history. From finding new prospects, to winning deals, and keeping the customer happy, everyone in the company has a part to play.

As a result, CRM systems should provide a **single database** that everyone can access as they need. This will reduce the costs associated with maintaining data. The idea is enter data once use it many times.

The single CRM database does however require management. Your CRM systems should **allow for security controls** that protect your business.

What's more, the way users interact with the CRM system will vary based on their job function. For that reason we have identified 3 broad types of user:

Marketing

Sales

Customer
Service



“The aim of marketing is to know and understand the customer so well the product or service fits him and sells itself.” Peter Drucker

How marketing teams get to know and understand customers has changed. The internet has created new challenges and opportunities. The marketing element of any CRM platform has also had to change. Now the key features required include tools to help acquire, develop and retain relationships at scale, at speed, in a **personalised way**.

A closer investigation would highlight the need to **integrate** with not only web sites, but also **social media** tools. Marketing is no longer just about promoting a message, now it needs to **involve active listening**.

Getting found online, nurturing a relationship, and earning the right to engage, needs to happen at scale. In the past sales people went rushing off to visit prospects at the slightest sign of interest. Increasingly prospects are doing more research online before they engage with your sales team. They are educating themselves without necessarily telling you. They are using social media, and professional networks, and are **engaging only when they are ready**.

So the marketing elements of your CRM system may need to include some or all of the following:-

Data import tools – to allow for list purchase or migration of existing data

Outbound tools – to communicate and disseminate information

Web form integration – to reduce rekeying costs

Inbound tools – to listen and nurture prospects

Analytics – to see what works and what doesn't

Seminar tools – to manage engagement with prospects

Social monitoring tools – to listen to customers and prospects

Data suppression tools – to ensure compliance with legislation such as TPS MPS etc.

Data augmentation tools – to improve your understanding of customers and prospects

Identifying which tools are important depends on how you intend to **grow your business**. They will help with client acquisition, retention and development. Your business plan should also provide some indication of the **scale** at which you want to operate. Are you going to engage with hundreds, thousands, or millions of prospects? Will customers have a reason to buy from you again? Will you be selling to other businesses or are you targeting consumers? And so on.



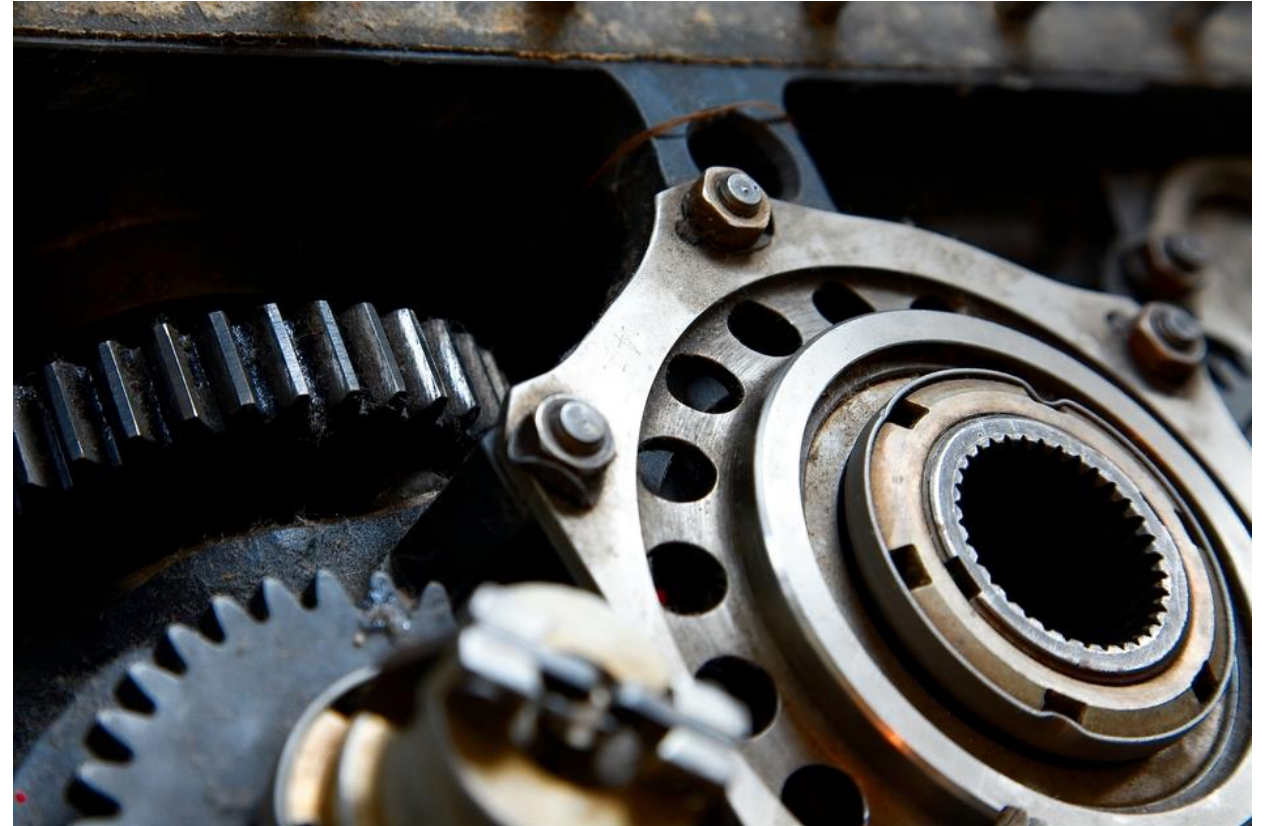
“To me, job titles don't matter. Everyone is in sales. It's the only way we stay in business.” Harvey Mackay author of Swim with the Sharks

So if marketing is doing the job right, and there is a flow of prospects ready to buy, who needs a sales team? Of course the reality is that **sales teams are still essential**. Indeed taking the warm body out of selling is a fast way to remove a lot of what sets you apart from your competition.

Remember how we discussed the changes the internet has brought about to the way people buy? In the past finding out detailed specifications or prices meant engaging with a sales person but, as we covered earlier, today prospects are **finding information on the net**.

Now your sales people are as likely to be assisting a prospect in their web research, as preparing a quotation. Their time is spent **talking about the prospects requirements** not your products features. They have become trusted advisors and business mentors, instead of product pitchers.

So many changes in such a short period of time have inevitably led to friction in some sales teams. Managers, who built their career on the latest pitch book and clever closing technique are **trying to manage the way they were managed**. New “generation y” hires are net savvy and are resisting old selling models.





CRM systems need to provide **tools for your team** today and into the future which may include some or all of the following:-

- **Sales Forecasting** – with enough analysis to satisfy demanding managers.
- **Opportunity management** – including sales processes and strategies
- **Sales playbooks** – including scripts and prompts
- **Account management tools** – including your selling methodology of choice.
- **Time management** – with easy calendar integration
- **Targeted call lists** – with easy reporting of outcomes
- **Quota performance reporting** – with real time bonus calculation
- **Territory management tools** – with east territory reallocation
- **Anywhere, any device access** – with in-built security



"There is only one boss. The customer. And he can fire everybody in the company from the chairman on down, simply by spending his money somewhere else." Sam Walton – founder of Walmart and Sam's Club

Before the internet, customers put up with whatever level of service you were able to provide. If you didn't answer instantly – they waited.

If your service or product were second best...who knew?

Now everyone knows. From eBay to Amazon, Trip Advisor to Google Reviews, your product and service can now be rated every minute of every day. Problems are news, and poor service is no longer something you can hide. Don't think it applies to your business? Get ready for an unpleasant surprise.

CRM needs to provide the tools to ensure that your customer service is a key differentiator. How you care for your customers should encourage others to buy from you.

As with all elements of CRM Customer Service requires **process** and **people**, to interact with the data. Your CRM platform may need some or all of the following features.

Contract management – to ensure that you get all those renewals on time, every time

Social media monitoring – allowing you to listen to clients in the social world

User group management – ensuring you can easily communicate with clients

Web self-help – allowing customers to solve issues 24 hours a day

Web chat – letting service staff interact in real time with clients

Web call logging – allowing customers to log calls online

Configuration management – for complex solutions

SLA management – if you offer Service Level Agreements

Case management – best practice tools to assure your quality of response

Defect tracking – ensuring that you are proactive in managing customer issues

Inventory management – linking customers to the products and services they own

Knowledge base – allowing for deskilling of the call logging process, and production of FAQ pages for your website

Selecting CRM for Your Business

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Our list of features is **not complete**. In each of the areas we have discussed there are **important considerations**. These considerations are driven by your business model, and your business plan.



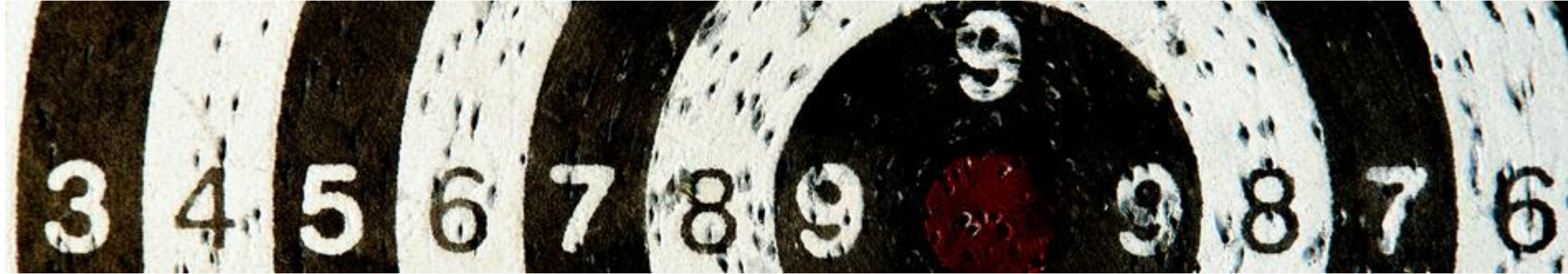
Just buying a software package will not improve your customer relationships, nor will it make them any more manageable.



Software can only provide tools that help your users **work with data**. The processes that you define and the **way you educate and develop your team** is what will ultimately help acquire, develop and retain profitable customer relationships.

So What Happens Next?

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So there you go. A clear set of processes that you want your team to follow. Tools to monitor and mentor them as they go about their day to day tasks. Depending on your choice of platform, as new innovations in sales, marketing or customer service emerge, your **CRM platform will change.**

CRM constantly changes. Users will come and go, the way you do business may change, markets and cultures will change. Throughout all this change you will need to ensure that the platform continues to deliver. This is why CRM implementation partners are an essential component of any CRM project..

Where now?

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eBooks



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Consultation

Or if you'd like to sit back and let the information come to you for a while before you make any big decisions, you can connect with us on these social networks...



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All that remains to be said is good luck with your CRM project!

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