

RESOURCE:

NOT SURE WHETHER YOU NEED A CRM?

**THE BEGINNER'S GUIDE TO CRM:
ALL YOU NEED TO KNOW ABOUT
USING A CRM SYSTEM**

SPREADSHEETS ARE FINE, AREN'T THEY?

'Customer relationship management' can sound intimidating to small and mid-sized businesses. After all, if your company only has a hand full of customers, why do you need a dedicated process or system to keep track of them? A few spreadsheets and in house rules will do just fine, or will they?

WHAT HAPPENS WHEN YOUR BUSINESS STARTS TO GROW?

At some point, the organisation will need to implement a customer contact management system that's more organised and streamlined than a mass of spreadsheets. And such a migration could be painful if the decision has been put off...for months / years....

At its core, a CRM system is not just useful to a large enterprise company - it's essential for businesses of all sizes.

But don't just take our word for it. Did you know that **75%** of sales managers say that using a CRM helps to drive and increase sales? Or that CRM systems improve customer retention by **27%**?

It's hard to argue with results like that.



WHAT IS A CRM?

CRM stands for **Custome Relationship Management**, and it refers to software that helps companies track interactions with their future and current customers.

The goal of implementing a CRM is to create a system that your sales and marketing teams can use to more efficiently and effectively interact with propsects and customers.

HOW DO MARKETING USE A CRM?

To ensure they are passing the right leads to their saels team - a key aspect of developing a strong relationship with the sales team.

AND SALES?

Salespeople will utilsie a CRM differently. They use it to source prospective customers, communicate with them, and track their interactions over time. Having the entire prospect history in one place increases their efficiency and improves their productivity.

For example, salespeople using a CRM won't have to hunt through their email to remember when and what was last said to a prospective customer.

WHICH COMPANIES USE A CRM?

The short answer is that any company who seeks to maintain a relationship with their customers can benefit from using a CRM system. To get a little for specific, there are two groups of companies that often see the most benefit:

1. B2B companies that typically need to track leads and customers across long sales cycles and through upgrade paths.
2. Considered purchase B2C companies

This being said, there are a lot of companies who don't fit the two profiles but still find value in using a CRM system.

Still not sure a CRM system can help your business? Think about what challenges your teams face when interacting with prospects or customers.



CHALLENGES A CRM SYSTEM AIMS TO SOLVE

- *Do you have a need for maintaining a central list of information about your leads and customers? Does this information live in disparate places?*
- *Are your customers regularly interacting with multiple people within your business? How does everyone keep track of what the last contact was?*
- *Do you struggle to understand the productivity of your sales team? Does your sales team follow a structured process?*

If you answered yes to one or more of these questions, chances are your business could benefit from a CRM System.

4 BENEFITS OF A CRM

There are many things a CRM can do which should get your marketers and salespeople champing at the bit to get their hands on it. Here's how a CRM can make a more effective marketing and sales team.

1. Better lead intelligence

Wouldn't it be helpful if you knew when a potential customer was visiting your website? Implementing a CRM will allow your sales team to know how many times potential customers have visited your site or if they have ever talked to a member of your sales team.

When a salesperson works within a CRM that integrates with their company's marketing software, they're able to access this type of detailed, real-time lead intelligence all in one place.

And this isn't just beneficial to sales, it's beneficial to marketing to see which leads turn into customers. More specifically, you can see what brought them to your website and what pages they looked at before becoming a customer.

When a marketer uses a marketing software integrated with a CRM, they are able to figure out which of their efforts are working best.

For further information visit:
[https://www.quattro.co.uk/
blog/topic/crm](https://www.quattro.co.uk/blog/topic/crm)

2. Better sales and marketing alignment

Sales and marketing both have numbers they need to hit each month, and when both teams have visibility into one another metrics they can easily assess each team's progress and identify and remedy problems early on in the month.

Real-time reporting holds both teams accountable to their goals and helps one another work together toward shared outcomes. (It's also worth noting that CRMs are used for customers, too, not just leads; so customer service communications and metrics can be easily documented for account managers to reference as well).

3. Help sales prioritise its pipeline

A CRM not only gives complete visibility into the sales pipeline, but it also helps sales people prioritise who to call first so they don't miss important opportunities. When sales and marketing set up a CRM, they can identify important criteria and even implement a lead scoring system. Organisational systems like these reduce time spent sifting through leads, and enable salespeople to prioritize the best opportunities.

4. Closed loop reporting lets marketers improve campaigns

When you integrate marketing software with your CRM, marketing can easily analyse the effectiveness of its campaigns using closed-loop reporting.

For example, when a salesperson converts a lead into a paying customer, he or she can mark it in the CRM, and it will automatically be noted in your marketing software, too.

This allows marketing to do two important things:

1. marketing can automatically remove this lead for their nurturing sequences, and instead send it customer-focused information.
2. marketing is now able to attribute this new customer to a specific campaign and channel. Mapping marketing activities to sales events is critical for marketing to improve future campaigns.



9 MUST HAVE FEATURES OF A CRM

Before all else, a CRM system should be useful to its end users: salespeople, sales managers, marketers, and business leaders.

CRM systems have a range of functionalities, but these nine features are must-haves for any business that is aiming to organize their systems and improve their efficiency.

1. Contact management

You won't find a CRM that doesn't have a contact management capability. If you do, chances are you aren't looking at a CRM. All CRM systems allow salespeople to create contact records and store prospect and customer information in a database.

However, the best systems that truly improve efficiency will reduce and streamline contact data entry as much as possible.

Judge this feature with ease of use in mind.

2. Deal stages

Most CRM systems can be customised to operate on a specific sales process. Whether your company has three deal stages or 15, you should be able to program these levels into the software and attach associated values.

It should also be easy to move a deal along the sales process, from one stage to the next.

Make sure the system you are using can be customised to your needs with ease.

3. Daily dashboard

Sales people need visibility into a number of metrics on a daily basis. Metrics such as their progress to date against quota, how many deals they have in their pipelines at which stages, and what outstanding tasks they need to complete.

Similarly, sales managers and leaders need to be able to view these categories for the aggregated sales team.

Evaluate this function based on visual appeal and simplicity.

Your 9 must have features of a CRM system

4. Task management

A sales person who has to toggle back and forth between several different systems to view and complete their daily tasks is not a happy person (though this is common).

CRM systems that include task management capabilities streamline salespeople's day-to-day workflow and help them keep on top of their follow up.

5. Content repository

Salespeople spend 31% of their time hunting for or creating content. To cut back on wasted time searching for content, look for a CRM system with an embedded content repository. Look for a system that allows salespeople to save their go-to pieces of collateral in one place.

And it's not just collateral. Writing email copy can consume time for a busy sales person. Look for a system that also allows the user to file away customised email templates, so the sales rep is not reinventing the wheel with every new outreach.

6. Automated data capture

One of the primary reasons companies decide to adopt a CRM is to keep better track of customer and prospect touches (emails, calls, etc).

But, beware: Many CRM applications require salespeople to copy and paste their email outreach into the system or even upload call recordings.

These extra steps can be maddening for salespeople who are making 50 or 100 calls every single day, and it leaves room for human error.

Look for a software that does this step automatically.

7. Reporting

A CRM system is only as good as the insights it provides. Be sure that your CRM provides reporting features that make it easy to export and distribute the trends that the system reveals.

8. Mobile

Sales people have seen productivity increased by 15% when they had mobile access to CRM applications. Tying reps to a CRM system that can only be accessed via laptop is bound to annoy them, especially if they're in a role that requires travel. The majority of CRM systems today allow salespeople to log on to the application from mobile devices such as tablets and smartphones -- make sure the ones you're considering do as well.

8. Integration with marketing automation

And last but not least, integration between your marketing and sales platform is crucial. After all, the underlying concept of "customer relationship management" is to provide a complete lifecycle view into each prospect and client. A gap between marketing automation and CRM can lead to lost information and lost opportunities.

CRM MUST HAVE FEATURES CHECKLIST

1. Contact management - which improves efficiency by streamlining contact data entry.
2. Deal stages - your sales pipeline process can be created within the software
3. Daily dashboard - ensure this is visually appealing and is simple to use by all members of the team.
4. Task management - is managed through the same system to streamline salespeople's day to day.
5. Content repository - collateral storage and customised email templates.
6. Automated data capture - automatically capture of salesperson activity within the database from calls, email and task notes.
7. Reporting - easily exportable trend analysis
8. Mobile - salespeople can access all functionality remotely
9. Integration with marketing automation - creating a complete customer lifecycle platform

CONCLUSION

To reap the full benefits of a CRM, you have to choose one with the features that are right for your business today and that can grow with you as your business evolves.

Think about your company's growth goals, and consider both your short-term and long-term needs when investing in a CRM platform.

Keep in mind, a CRM is not only a financial investment, it is also a time investment for your sales and marketing organisation. Picking the right system, implementing it, and enforcing best practices around its usage will pay dividends as your company continues to grow and scale.



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