



BUS373 Project

TITLE

CRM systems IT solution by CRM sage

Name: Waleed Altuwaijri.

ID: 222111308.

Section Number: 22

Muharram 16, 1445 AH

Spring Semester

2022\2023

Introduction

CRM is a complete software system that handles customer relationship management, but it is not a single solution. To effectively manage, analyze and improve your customer relationships, you need a comprehensive suite of cloud solutions that support your organization at every point of customer interaction.

So why should a CRM solution include a sales cloud, service cloud, commerce cloud, and marketing cloud, as well as a customer data platform that can combine online, offline, and third-party data sources for a comprehensive customer view that's always up to date.

A CRM system collects, correlates, and analyzes all data collected for a customer, including customer information, interactions with company representatives, purchases, service requests, assets, and proposals/quotations. Then the system allows users to access that data and understand what happened at each touchpoint. With this understanding, a complete customer profile is developed, and a strong customer relationship is established.

Customer data may also be collected for filling out incentive forms, sales estimation, zoning, campaign design, product innovation, and other sales, marketing, and customer service activities. CRM software and tools help you simplify customer engagement, close more sales, build strong relationships with your customers, build customer loyalty, and ultimately

Who should use a CRM system?

CRM tools are often seen as sales tools. However, over time, these solutions have expanded their scope to become an essential part of marketing , e-commerce and customer service functions .

The power of CRM is derived from constantly collecting customer data, analyzing that data, and then using that insight to deepen relationships and improve business results. Allow any customer-centric employee to convey "We know and appreciate you."

Our suite of data-driven CRM tools supports you beyond the sales process, which is critical to business performance. With an in-depth knowledge of the customer, you can do the following:

- Display new additional products and sell them at the right time and at the right price
- Help customer service teams resolve issues faster
- Help development teams create better products and services

CRM: What's the point?

CRM software supports strong customer relationships, productivity, and loyalty through informed and differentiated customer experiences. What is the goal? Improve customer acquisition and retention by providing experiences that keep your customers coming back. CRM is a strategy and tool that supports these experiences in five key ways.

1 Answering key customer questions

CRM helps you reach new customers, sell to them, and develop a loyal relationship with them. These systems collect and organize many different types of customer data so that they better understand your potential customers/customers and can answer (or even anticipate) their questions.

2 Customer data management

Bad decisions come from not having access to customer data and not being able to interpret it. The ability to store, track, and verify customer data within an automated system allows sales and marketing teams to improve customer engagement strategies and create better relationships.

3 Sales process automation

Automating your sales force processes increases sales efficiency, helping you sell more quickly. The best CRM systems use artificial intelligence (AI) and unified customer data to automate the sales process by motivating sellers with best recommended actions.

4 Customize marketing campaigns

Customers and leads reach through various channels, including websites, social media, email, online/offline events, and more. Unfortunately, many companies struggle to link their marketing efforts across all of these channels. Marketing teams can improve conversions, enhance customer relationships, and align messaging across their customers' digital channels by leveraging CRM systems.

5 Matching sales and marketing

With CRM, marketing and sales work better together to boost sales and increase revenue. When sales and marketing are in sync, sales productivity goes up with marketing return on investment.

CRM features and benefits

CRM solutions are among the largest and fastest growing category of enterprise application software. The CRM market size was valued at \$41.93 billion in 2019 and is expected to reach \$96.39 billion by 2027 , growing at a compound annual growth rate of 11.1% from 2020 to 2027.

More and more companies are using CRM solutions to gain more sales marketing opportunities, improve the sales funnel, boost productivity and improve customer satisfaction. However, many faced issues ranging from cost overruns and CRM integration challenges to system limitations. These are avoidable issues, and you can help ensure success by focusing on a strategy that puts the customer first.

It is very important for companies to have comprehensive, customizable and integrated offerings of customer product/solution benefits, potential customers, customer service needs and purchase history. A good CRM system should provide this offering. All data is in one location and can be viewed through enhanced dashboards.

In addition, your marketing team can leverage CRM solutions to coordinate customized marketing campaigns and attract potential targets. These systems can help track all interactions across channels—from sharing to purchasing. Mature cloud CRM solutions do more than that. It is also fully integrated with back office solutions to successfully support the entire customer journey.

Because it manages leads and customer engagement scores across all channels, your CRM system can inform all communications and marketing activities, providing the 360-degree customer insight required to experience multiple channels that are truly connected.

Many different suppliers have different types of solutions. However, there are some capabilities that must be available.

1. Easy to use, otherwise it will not be used.
2. Fits your budget and provides an acceptable return on investment
3. Integrated with other software systems
4. Accurate and consistent data availability for this much needed comprehensive and complete offering to customers

Types of customer relationship management

CRM software solutions are, in essence, used to manage customer relationships and sales interactions. However, many companies are taking advantage of these systems simply as a tool to automate sales force processes. But these solutions, like Oracle's, provide many more valuable capabilities that cover a broad range of marketing and sales functions, including marketing, customer service, sales, and partner channel management.

CRM software can now support the entire customer journey. But what one company needs from a CRM system may be very different from what another may require. To help you decide which CRM is right for your organization, it's helpful to know that there are three main types of CRM solutions: collaborative, operational, and analytical.

Customer relationship management and data

Data is the most important part of any CRM software solution. In fact, customer data is the starting point for all marketing and sales activities. Successful customer engagement and relationship strategies depend on accurate, complete, and accessible customer profiles. Bad data comes from many places, including:

- Fraudulently entered data
- Keystroke errors
- Duplicate customer data
- Normal changes (company bankruptcy, job changes)

Incomplete and inaccurate data can quickly build up to devalue CRM tools, leading to unnecessary expenses. On the contrary, when customer data is complete and accurate, companies have a better chance of reaching their target customers and potential customers. In short, your data is a valuable asset. So it's important to focus on collecting and optimizing these four types of CRM data:

Identity data

Identity data includes descriptive details to identify customers, marketing opportunities, and contacts. This data should be used for marketing segmentation.

Metadata

Metadata includes lifestyle details relevant to your contacts. This completes the all-important holistic view of marketing opportunities and contacts.

Quantitative data

Quantitative data includes measurable data points that can help you interpret how prospects and contacts interact with you.

Qualitative data

Qualitative data can help you better understand the purpose of your contacts, including search behaviors related to purchasing decisions.

CRM vs. Marketing Automation

Both CRM and marketing automation platforms are data-driven. Focuses on data collection, storage and use. For example, marketing automation systems gather marketing opportunities by communicating with potential and existing customers.

Specifically, marketing automation is looking to collect enough customer data points to show intent and then present that person to the sales force as a Marketing Qualified Lead (MQL) . The CRM solution detects where your marketing automation solution is lagging and converts those marketing qualified leads into contacts.

Artificial Intelligence in CRM

The best CRM systems provide powerful analytics combined with AI and machine learning. AI is the future of CRM, going beyond contact management and automating sales force processes to help you actually sell.

The AI in CRM can direct you to the best next actions and provide intelligent talking points—specific to each customer's sales opportunity. AI also provides intelligent, timely customer analysis that helps improve customer experience (CX) across marketing, sales, and customer service .

CRM vs. CX

When CRM first came on the scene, companies were collecting data but not knowing what to do with it. Today, CRM systems are integrated with artificial intelligence, which helps interpret and predict what this data means.

CRM's AI capabilities are the foundation for using a holistic view of the customer that will initiate them towards becoming your customer. As these AI improvements continue, the customer experience system will continue to improve, and thus customer expectations will continue to increase.

Your company needs to fully understand your customers (and how they buy) to not only meet their expectations, but to provide them with engaging experiences. This is the future of CX, and it should serve as a guide for choosing a CRM solution.

CRM improves customer experience

A complete customer view is essential to business success and growth. Without a CRM system, you will struggle to develop a comprehensive customer proposition that you need to:

- Personalize customer interactions
- Business process automation (with appropriate cloud customer experience integrations)
- Track all customer interactions

How CRM improves customer service

CRM software solutions help salespeople organize leads, automate follow-ups, manage opportunities, and plan sales. But sales aren't the only department within your organization that can benefit from a CRM platform. Marketing, customer support, product development, content management, and human resources can generate a high ROI from a CRM solution.

For example, because the solution maintains basic information about each customer, customer support teams can put this customer data to good use. With CRM data, your customer support reps (CSRs) have more insights into what your customers are, their needs and motivations, and what kind of relationship they've had with your brand in the past. This information provides customer service representatives with context when interacting with those customers.

CRM cloud service

As with any other business application, the decision to host your CRM on premises, in the cloud, or a combination of both depends on your business needs.

Local customer relationship management

On-premises CRM gives you complete control of your system, but there is a trade off. These systems must be purchased, installed, deployed, monitored, maintained, and upgraded. As a result, these systems can be expensive, involve time-consuming installation and upgrade processes, and require internal IT resources for ongoing maintenance.

With an on-premises CRM solution, accessing new functionality can be a long, drawn-out, and expensive process. Also, the complex technology based on artificial intelligence—to support virtual assistants, chatbots, best future recommendations, and predictive analytics—will not be available.

CRM cloud service

Software-as-a-Service (SaaS) options provide simple, easy-to-use interfaces and require less IT involvement and investment than on-premise CRM tools. Because upgrades are pushed automatically, you always have the latest functionality without too much IT effort.

This includes new advanced technology, such as artificial intelligence and machine learning, that can help you transform your customer data into relevant customer experiences. The cloud-based CRM system also provides the convenience of anytime and anywhere access through mobile devices.

Hybrid CRM deployment

Deploying hybrid CRM requires trade-offs in all of the above areas, however this deployment model can also offer the best of both worlds. But it is important to realize that information technology is increasingly shifting to the cloud. Companies that continue to invest heavily in on-premises CRM risk being left behind and ahead of their competitors in the cloud. Your ability to provide access to mobile devices will also be limited.

There are a lot of things to consider when selecting a CRM system for your organization. But in the end, the right CRM model for you is one that allows you to interact with your customers in meaningful ways to foster exceptional customer experiences.

What is Sage CRM

Sage CRM is the main **Customer Relationship Management** software product offering by Sage for small to medium sized companies. **Sage CRM** is a sophisticated CRM solution that includes three key modules, Sage CRM for: **Sales, Marketing and Customer Service**.

The Sage CRM software solution is **highly configurable, flexible and scalable**. The software can be deployed online in the **Cloud** or installed on your own server with an **On-Premise** software licence.

One of the key strengths of Sage CRM is that it integrates seamlessly with Sage's flagship accounting products such as Sage 50 and Sage 200 (known as Sage 200 CRM). The integration allows you to see valuable accounting data from Sage within the CRM system. The integration between Sage accounts and Sage CRM allows you to create orders in CRM whilst avoiding data-re-entry in Sage accounts.

Sage CRM - Manage Sales, Marketing and Customer Service

Users of Sage CRM for Sales are able to manage sales leads and sales opportunities whilst tracking the performance of sales staff and sales teams, it also allows users to manage forecasts, schedule meetings and a lot more.

Sage CRM for Marketing offers a wide range of marketing tools to manage campaigns and generate leads, whilst the Customer Service module enables your business to offer outstanding customer support.

Key Features and Benefits for Sage CRM for Sales

The Sage CRM for Sales module provides a wide range of features and benefits for your sales reps and sales teams, these include:

- Powerful salesforce automation
- Comprehensive customer relationship management
- Contact and account management
- Record and action all activities with clients
- Powerful follow up scheduling and diary management
- Opportunity management
- Sales revenue forecasting
- Integration with email such as Microsoft Outlook
- Manage sales leads from start to finish
- Interactive KPI Sales dashboards and reporting
- Create quotes and orders from within Sage CRM
- Territory management
- Manage sales teams and targets

Key Features and Benefits for Sage CRM for Marketing

The marketing module in Sage CRM enables you to generate new leads for your business and communicate with prospects and customers, key features and benefits of Sage CRM for Marketing include:

- Marketing campaign management
- Sage CRM for Marketing integrates with Mailchimp
- Social media integration
- Lead scoring
- Powerful marketing dashboards and reports
- View campaign response rates
- Target specific groups from within Sage CRM
- Outbound telemarketing activities
- Surveys
- Website activity tracking
- Advanced lead capture
- Marketing workflow tool
- Nurture marketing

Key Features and Benefits for Sage CRM for Customer Service

Customer service enables Sage CRM users to provide excellent customer support to clients. The Sage CRM customer service module offers extensive help desk and support functionality so users can log support cases and quickly resolve problems for clients. Benefits and features include:

- Sophisticated support knowledgebase
- Provide high quality incident-support with case management
- Publish reviewed and approved solutions
- Manage service levels agreements
- Track problems from start to finish
- Assign support cases to teams and users
- Ticket management
- Speed search
- Automated workflows
- Advanced issue tracking and resolution tools
- Customer support web portal

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- Contact and account management
 - Powerful support dashboards and reports

How CRM can help your business deliver an exceptional customer experience

A CRM solution helps you simplify the sales process, shorten sales cycles, and make the most of every sales opportunity.

CRM software automates sales tasks such as creating quotes and orders, forecasting sales, progressing leads and converting them to opportunities using sales workflows. Using CRM software, your marketing team can identify the sources of leads, opportunities and closed sales.

They can also find customer information for upcoming campaigns and send targeted email marketing campaigns. When customers place orders for your products or services after these marketing campaigns, you can track these orders using an ERP or business management solution, like Sage 300cloud.

CRM systems drive exceptional customer service

Your marketing team can use your CRM software database to find customer information and identify the sources of leads, opportunities and closed sales within the UAE and beyond.

This lets them launch targeted email campaigns – and when customers place orders for your products or services, you can track them using your ERP or business management solution.

Satisfy your customers

Tailored communications make customers feel seen, and a complete overview of engagement enables your customer service team to resolve queries faster, with more personal responses.

CRM software integration boosts sales

The implementation of a powerful CRM software system will streamline and charge the sales process by automating tasks, including creating quotes and orders, forecasting sales, progressing leads, and converting information into opportunities using sales workflows.

Reach the right audience

CRM software generates reliable business insights that you can use to target the customers who are most likely to be interested in your products and services.

Target your marketing

With an integrated CRM system you'll be able to launch effective, tailored and data-led marketing campaigns that deliver a higher return on your investment.

Improve productivity and profitability with flexible CRM software

Sage Business Cloud offers a better, faster way of managing your entire business.

Help your teams be more effective

A consolidated view of your data will minimise work duplication and pave the way for more efficient customer relations.

Nourish customer loyalty

Use CRM software solutions to gain an end-to-end view of the customer life cycle based on real-time data, and capitalise on up-selling and cross-selling opportunities.

Drive growth through marketing

With reliable customer data at your fingertips, your CRM platform lets you build targeted campaigns that drive higher growth.

How SMEs can benefit CRM software implementation

Consolidate your business information

With all your critical business information – including communication histories, sales quotes, orders, opportunities, and support cases – organised in a secure CRM software database, you know you're always acting on up-to-date information.

Streamline and automate sales

Save time and reduce human error. A good CRM system will automate many of the manual day-to-day tasks that make up the sales process, including order processing, lead management, sales forecasts and scheduling sales calls.

Send targeted marketing campaigns

Plan targeted marketing campaigns and generate reports in minutes – making sure your communications are effective and reach the right customers, giving you a higher return on your investment, faster.

Provide world-class customer service

Putting your customers first and making sure they feel valued will improve your retention rate and drive growth. Agile CRM software tools can help you keep customers happy and outperform the competition.

Use analytics to improve performance

Use CRM software to generate reports on sales, customer service, leads, marketing and more. You can even create bespoke reports that measure business performance against KPIs, to make sure your strategies are delivering.

Organise your contacts

Your CRM system will store information like phone numbers, emails and postal addresses for all your contacts in a secure, online database. This means your team can access the details they need from desktop computers, laptops and mobile devices anywhere.

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