Using CRM to Improve Your Business

Simply put, a well-implemented CRM can have a dramatic impact on your business. Just ask any entrepreneur who is successfully using a system. Anyone who has spent the time identifying the right system will probably tell you that there are noticeable, or even amazing, improvements in business just from implementing a CRM and looking at it often.

**Setting Expectations**

It’s important to remember that a CRM is not magical. Some people get frustrated with a system after they’ve made the effort to implement it because they are not seeing a clear ROI in terms of profit or time right away. This is because CRM is not a “one and done” deal. While implementation is one important piece of the puzzle, it’s not the only one. You have to include plans for checking in with the system on a regular basis to see how it’s working and to capture the necessary data to tweak your responses.

One of the most critical aspects of your CRM is in capturing customer knowledge. With the right tool, you’re in the driver’s seat about how to choose what information you need to capture and how you’re going to use it. Don’t choose too much information, because you’re unlikely to be able to keep up with that schedule. Identify a handful of metrics to improve at one time, then move on to others. This allows for systematic improvements of your knowledge of customers without giving too much room for error that you’re going to fall behind with the process.

**Getting Insight**

Having a CRM solution handling all the information that your company has gathered from customers over the course of years can give you a broad window into what your past customers have needed and the extent to which you provided it. Whether you’re looking to improve existing processes or you’re getting ready to launch some new aspect of your business, CRM gives you the power to understand who you’re targeting.

An approach that several different CRM systems have incorporated is the concept of ensuring that the information from users is stored in the cloud, so that employees or other key stakeholders can access this information quickly and easily. This allows for data that is easily within reach and in the same place for all users. Remember that your data from a CRM is always evolving, so you should develop a schedule that allows for regular review so that you can spot any new trends.

**CRM and Your Sales Team**

Salespeople on your team are critical for continued growth and service. CRM systems give your sales team the capability to follow up with clients and close sales more effectively. The CRM system you choose should also allow for management to monitor team performance and spot trends that allow training. With training, a salesperson can understand their metrics more clearly and determine the right education that is necessary to unlocking the next door of success. Getting your sales team to understand the purpose of CRM is a step worth taking.