

INTERNAL MEMO

To : Chief Executive Officer

From : IT Department

Location : BUNGOMA HQs

Date : January 28,2023.

Subject : PrimeCRM Release (v.0.1)



Introduction

Customer Relationship has become a crucial part and parcel of every organisation. With the concept of big data and the need to easily monitor and track company clients. This memo addresses an implementation of such a tool to manage customers within umoja magharibi kenya limited.

What is a CRM

Basically a CRM (Customer Relationship Management) is a system that manages the organization relationships and interactions with customers or clients, so the main core component in a CRM is the *customer*. The customer in the context of the CRM has a lot of statuses and passes through a cycle of stages in other terms called a *pipeline* until he becomes the organization's loyal customer.

It gathers, links and analyzes all collected contact information, interactions with company representatives, service requests and proposals from new leads.

The system then lets users access that data and understand what happened at each touchpoint. Through this understanding, a complete customer profile is developed and a solid customer relationship is built.

The customer data can also be aggregated to populate incentive compensation modeling, sales forecasting, product marketing and customer service activities.

This allows an organization to establish a strong customer relationship, build customer loyalty and ultimately increase sales and profits.

Objectives:

1. To manage Customer data- hence streamline their flow until when initiated fully into the company.

2. To Personalize marketing.
3. To Align sales and marketing.
4. To Answer the most basic customer questions.

Who should use Prime CRM?

CRM tools have almost always been seen as sales tools. However, over time, these solutions have extended their reach and become integral to marketing, ecommerce, and customer service functions.

The CRM and data

Data is the most critical part of (any) the CRM software solution. In fact, customer data is the starting point for all marketing and sales activities. Successful customer engagement and relationship strategies hinge on accurate, complete, and accessible customer profiles.

Bad data comes from several places, including:

- Fraudulently entered data
- Keystroke errors
- Duplicate customer information

When customer data is complete and accurate, the business will stand a better chance of reaching target customers and prospects. In short, the data you entered is a valuable asset.

So it's important to focus on collecting and optimizing these four CRM data types:

Identity data

Identity data includes descriptive details to identify customers, leads, and contacts. This data is the one to be used for marketing segmentation.

Descriptive data

Descriptive data includes lifestyle details relevant to your contacts. It is what completes that all-important 360-degree view of leads and contacts.

Quantitative data

Quantitative data includes measurable data points that can help you interpret how your leads and contacts have interacted with you.

Qualitative data

Qualitative data can help you better understand your contacts' intent, including search behaviors related to buying decisions.

CRM benefits

- Being able to store, track, and validate customer data within an automated system will allow sales and marketing teams to optimize customer engagement strategies and build better relationships.
- Customers and potential customers arrive through various channels, including websites, social media, email, online/offline events, etc. The CRM will allow the organization to connect marketing efforts through all these channels.
- With customer relationship management, marketing and sales work better together to drive sales and increase revenue. When sales and marketing are in sync, sales productivity goes up along with marketing ROI.
- Customer relationship management helps you find new customers, sell to them, and develop a loyal customer relationship with them. The system will allow one to collect many different types of customer data and organize it so you understand your customers/prospects better and can answer (or even anticipate) their questions.
- Automate business processes (with appropriate CX integrations) and track customer interactions.

Methodology

This shall be administered as follows;

- ❖ First Release will be the CRM module
- ❖ Second Release will be the Intranet

Conclusion

We believe that this CRM system will be a game changer in the whole organization .It will bring about increased productivity which will attract inevitable growth in the sectors of sales and marketing.

What to do Next

- 1.Log in into the CRM using credentials from your mail.
- 2.Add your leads into the system.
3. Update the client as appropriate.

Link: <https://primecrm.theprimehouse.co.ke>

Thank you in Advance.

Signed

A handwritten signature in black ink, appearing to read "Nthiwa Patrick".

Nthiwa Patrick

Team Leader - IT