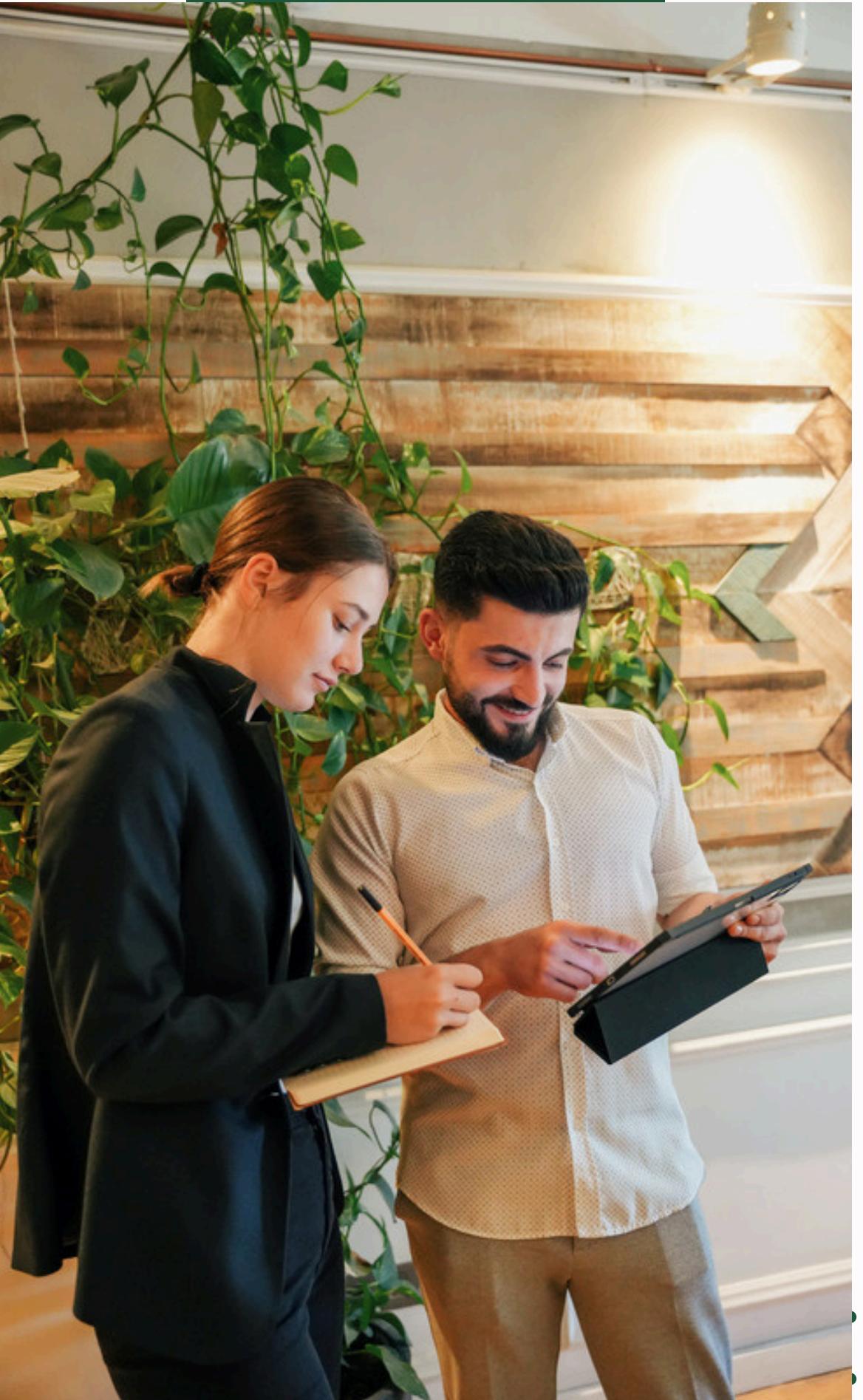


The Customer Compass

Intro to CRM

Bringing business and customers together



What is CRM?

Customer relationship management (CRM) is a strategy that organizations use to manage interactions with customers and potential customers helping organizations streamline processes, build customer relationships, increase sales, improve customer service, and increase profitability.

The goal is simple: improve relationships to grow your business.



CRM tools can unify customer and company data from many sources and even use AI (artificial intelligence) to help better manage relationships across the entire customer lifecycle, spanning departments like **marketing**, **sales**, **digital commerce**, and **customer service interactions**.



- A dark green rectangular area with a white border, surrounded by a grid of small black dots.

What does a CRM do?

A CRM system helps businesses manage and track their interactions with customers and potential customers.

01



CRM systems can **store and manage a wide range of customer data**, including contact information, sales history, purchase history, and customer preferences.

02



CRM systems can **track customer interactions** across all channels, including phone, email, social media, and in-person meetings. This information can be used to identify customer pain points, provide personalized service, and improve customer satisfaction.

03



CRM systems can help businesses provide better customer service by providing a centralized repository of customer information, automating **customer service** tasks, and tracking customer satisfaction.

04



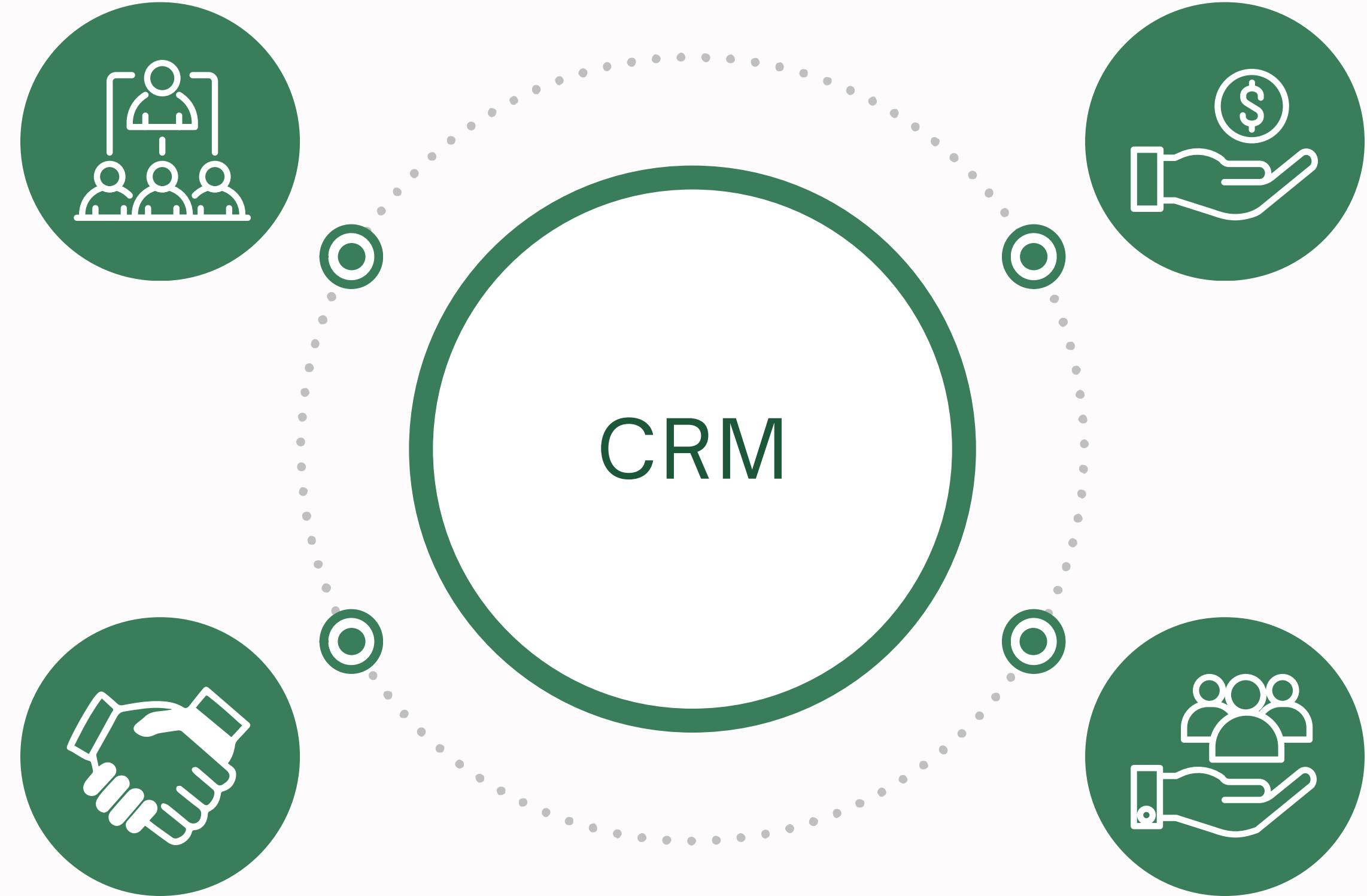
CRM systems can help businesses **increase sales** by providing a better understanding of customer needs, automating sales processes, and tracking sales performance.

"Unlocking Customer Insights: The Power of CRM Software"

CRM software offers a consolidated customer profile, presenting a unified, secure, and adaptable dashboard containing crucial details such as purchase history, order status, and unresolved service matters.

This comprehensive overview proves invaluable, particularly given that 70% of customers anticipate every representative they interact with to be well-versed in their purchase and issue history.

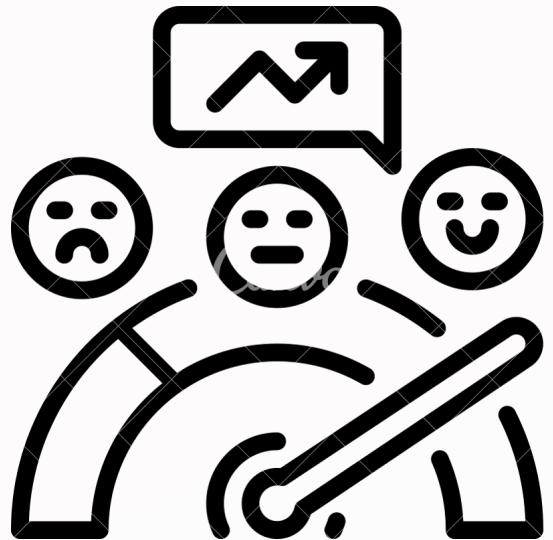
Whether past communications occurred via phone, chat, email, or social media, having a single, reliable data source ensures that all team members can deliver the anticipated level of service.





Benefits of CRM

Increased Customer Satisfaction



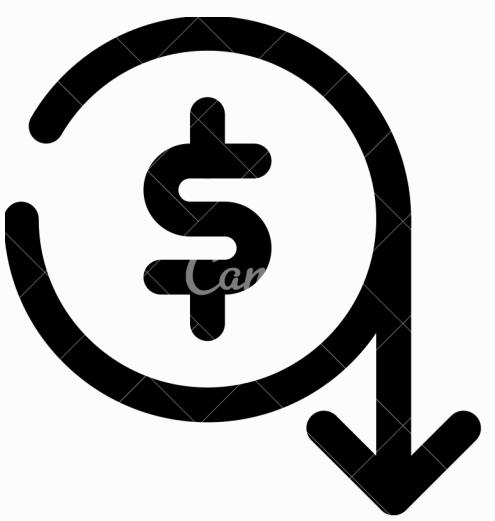
CRM systems help organizations track customer interactions and preferences, which can be used to provide more personalized and timely service. This can lead to increased customer satisfaction and loyalty.

Improved sales performance



CRM systems can help organizations track leads, opportunities, and sales pipeline. This information can be used to identify and target high-value customers and opportunities, and to improve sales forecasting and performance.

Reduced costs



CRM systems can help organizations automate tasks such as lead generation, customer service, and marketing campaigns. This can free up employees to focus on more strategic tasks, and can lead to reduced costs.

Improved decision-making



CRM systems can help organizations collect and analyze data about customer interactions, trends, and behaviors. This information can be used to make more informed decisions about marketing, sales, and customer service strategies.

USE CASES

Examples of Businesses using CRM
to Boost Sales Efficiency



Asher College- CRM for greater student engagement

With locations in Dallas, Las Vegas, and Sacramento, Asher College offers career-focused education in business, medicine, trades, and technology. They've concentrated on attaining a single goal: providing students with rigorous and comprehensive training for real-world professions.

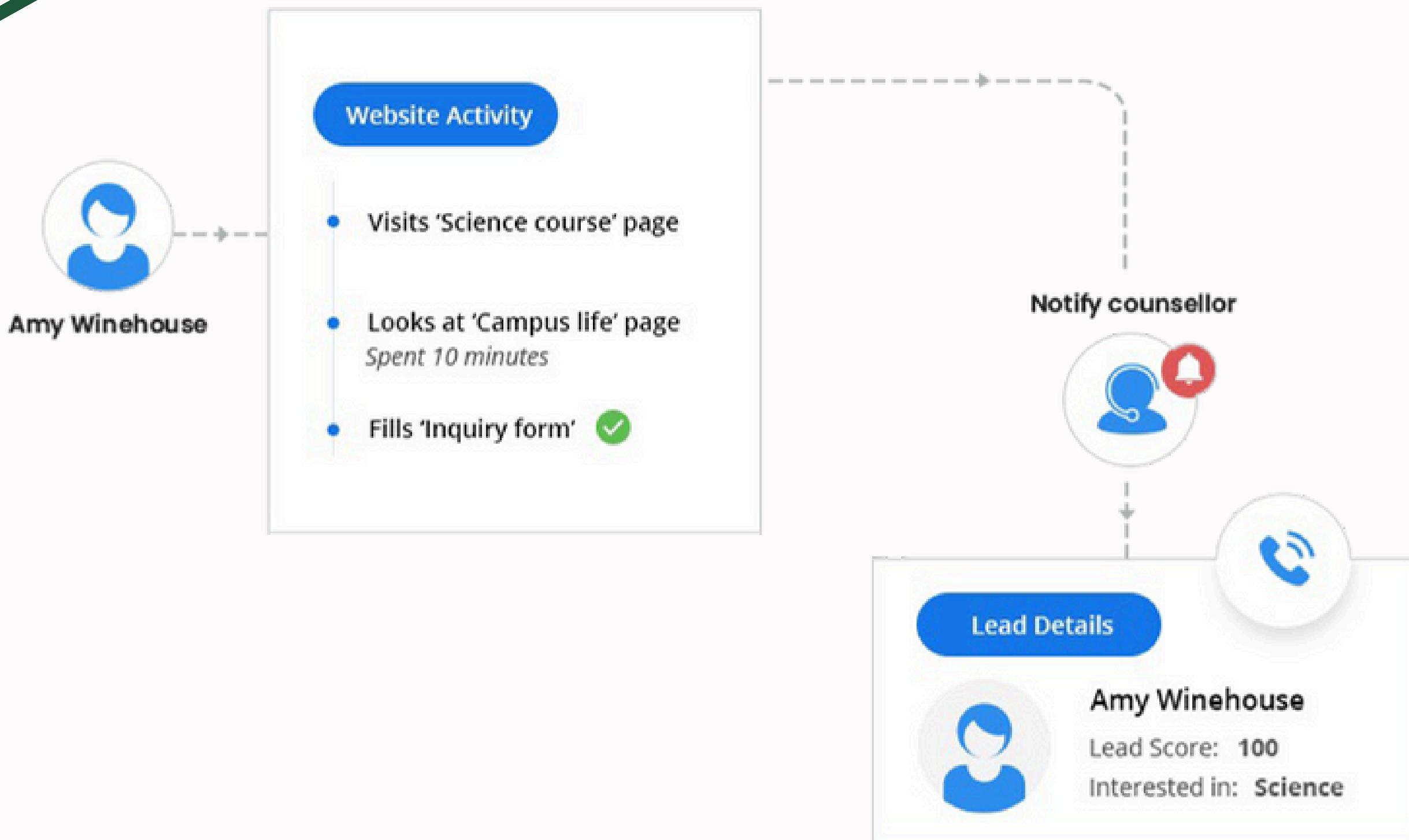
Asher previously had an in-house enrollment management system. Yet, it didn't allow them to reach out to prospects rapidly, prompting the adoption of third-party applications to provide all of the essential features, such as calls, bulk emails, SMS, and lead scoring. All of these roadblocks were preventing admission counselors from having fruitful interactions with potential students.

Since an **enrollment CRM** offers several features that involve lead scoring, automated marketing campaigns, detailed reports, and centralized data available for all, it was an apt choice. The advantages of partnering with a single enrollment solution provider rather than several vendors were obvious to Asher's management team. **The admissions team was able to boost speed-to-lead by 12 times.** It enabled them to customize communications throughout the student life cycle and track them, resulting in meaningful student engagement from start to finish. Their **contact rate went up by 13%, and scheduled campus appointments improved by 5%.**





Asher College- CRM for greater student engagement



Meesho

CRM for better seller management

Vudit Aatreya and Sanjeev Barnwal, two IIT Delhi graduates, founded **Meesho, an Indian-origin reseller marketplace**, in late 2015. The business is building the next major online distribution network for home-based businesses. Individual resellers may use WhatsApp, Instagram, Facebook, and other social media platforms to promote their items. It empowers the livelihoods of millions who had so far been waiting for a shot at independence and success. As the company began expanding and the team was growing, they realized that they needed a tool to manage their leads.

Their major requirements were:

- A platform to keep suppliers engaged and increasing the ease of onboarding.
- A user-friendly tool that is adaptable.
- A tool that could automate manual processes.

In their search to support these needs, they discovered a CRM that could help meet these requirements. With LeadSquared, they've achieved the following results:

- They have eliminated the manual method of supplier engagement in favor of a more automated approach.
- Information is shared more quickly and efficiently through teams.
- Documents are automatically verified, making the suppliers' onboarding experience faster.



Meesho

CRM for better seller management

A representative from Meesho states- “Where an individual salesperson took around 8-10 mins to fill in the required details of a prospective supplier, with LeadSquared it just takes a minute. We are very pleased to see that the productivity of the team has increased to 70% from an earlier 5-10%.”



When to incorporate CRM in a business?

Here are some signs that your business may be ready to implement a CRM system:

- You are growing your customer base and need a way to manage your growing customer interactions.
- You are not sure if you are targeting the right customers or if you are reaching them effectively.
- You are not sure how to track your sales pipeline or measure your sales performance.
- You are not sure how to provide personalized customer service or how to improve customer satisfaction.
- You are not sure how to make informed decisions about your marketing and sales strategies.



THANK YOU

