

Benefiting from Customer Relationship Management (CRM)

CASE STUDY

CRM helps SwellPath maximize opportunities

SITUATION Digital marketing agency SwellPath only launched in January 2009, but it's already making a big splash in Portland, Oregon. Managing Partner Adam Ware explains how customer relationship management (CRM) has helped them build the business.

"When we started getting more than three or four solid leads a week, it became too much to manage leads and referrals organically, without a system," he says. "We weren't always able to keep track of everyone who had expressed interest in us or consistently share the information between stakeholders. Also, we found ourselves repeating contacts."

"What we needed was a centralized database for our leads, prospects and potential deals. We asked similar agencies our size what they used and Salesforce was the typical recommendation."

Not that it was an easy decision. "The investment is pretty substantial for an organization like ours, but we made the leap because it offers all the reporting we need to make the most of our opportunities, the system is very easy to navigate, and it integrates with Google Apps, which was key because that's what we use to manage all our contacts and email."

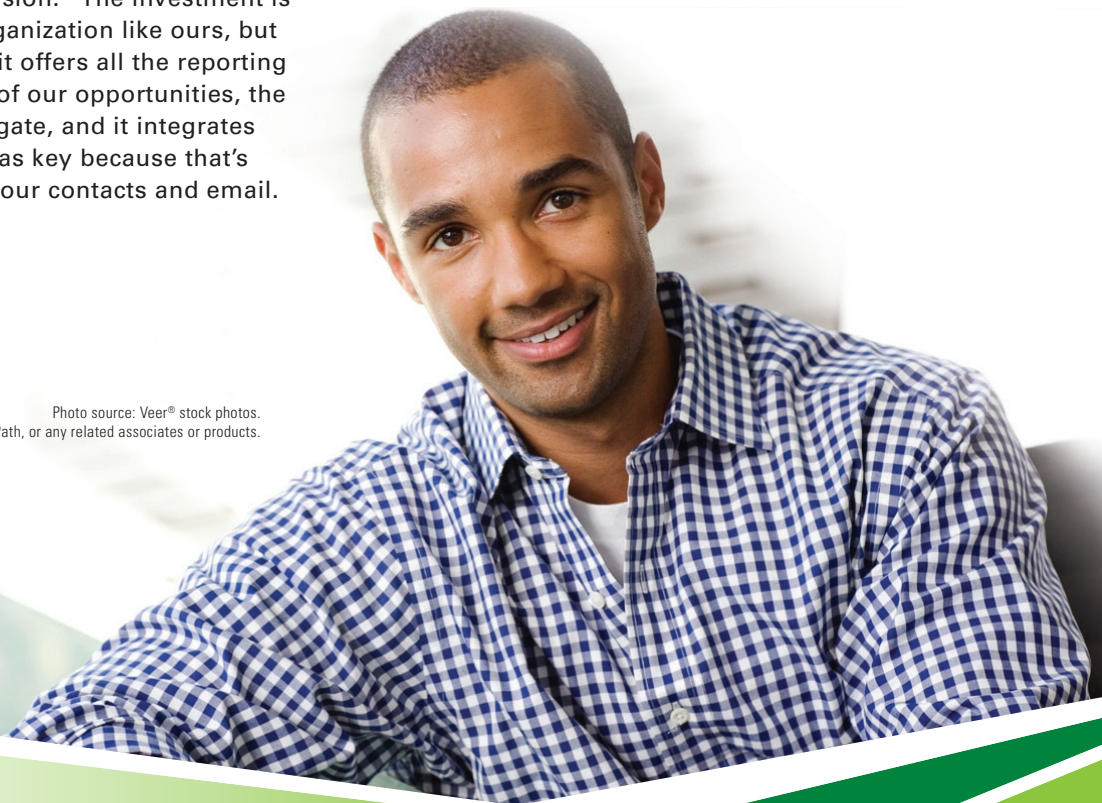
RESULT "Now we can answer, 'Why are we missing opportunities? Are we losing to competitors? Is our lead nurturing poor? Are we bringing in leads that are not properly qualified?'"

And as we bring on more people we can easily help them tap into our current client base and the wider market."

Like many small businesses, SwellPath has felt the strain of juggling resources when a big project demands lots of attention on a tight schedule. When this happens, using a CRM tool helps them maintain their weekly check-ins on other projects and accounts so nothing slips during the big push.

Adam is careful to note that for SwellPath, customer relationship management goes beyond using a good tool. "It's been a mindset for us from the get-go," he emphasizes. "Delivering above what clients expect — we've always focused on that."

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The relationship business

If you think “customer relationship management” sounds like a basic business priority, you’re quite right. Most small businesses know all too well how much they depend on good relationships with customers. Using a CRM system takes this general principle (and your business) to the next, more productive level.

What is CRM?

Customer relationship management (CRM) combines two things:

- 1. A customer-focused business strategy:** Understanding your contact, service and marketing practices in terms of how well they address customer needs.
- 2. The tools that help you fulfill that strategy:** Typically software programs or online services that help you quickly and easily track your interactions with customers, manage contacts and workflows, customize your marketing efforts, and more.

As you might have guessed, you can’t effectively use number two without number one. Once you define where you need help, CRM tools can make every customer interaction more productive, engaging and profitable.

What can CRM do for me?

Contact management

This is the most basic level of CRM; it will help you organize customer and company contact details in one place, set reminder alerts for business activities and communicate with customers (via email). You can typically export the data from a basic contact management system to spreadsheets or other applications. Microsoft Outlook is one contact management system you may already be familiar with.

Opportunity management

Also known as sales force automation (SFA), opportunity management systems combine contact management with a single, real-time view of where you stand with each customer right now: what you’ve sold them, what you’ve said to them, how profitable they are to you and how often you’ve contacted them. It’s not just about what you’ve already done; it’s about using that information to figure out your emerging opportunities and how to make the most of them. Highrise and Goldmine are two examples of typical opportunity management systems.

Marketing automation

In addition to contact management, these solutions can include anything from automatic personalization and sending of marketing materials (usually emails but sometimes also direct mail, faxes and voice messages) to complete campaign tracking. They may help you target customers with tailored messages based on their interests, preferences and purchase history. Solutions geared to small businesses include Infusionsoft and Relenta.

How can CRM make my business better?

Centralizing your contacts, monitoring processes and tracking communications with CRM can help you:

- Improve your responsiveness to customers:** When you have instant access to customer contact and account information, you can respond faster and more accurately to their requests. Also, with opportunity management tools on your side, you can anticipate customer needs based on past interactions.
- Improve customer service and support:** When sales, customer service and other support teams all have access to account, inventory and client information, they can resolve problems more efficiently — and your clients receive seamless service.
- Simplify and target your marketing:** Use tools that draw on a database of customer interests, preferences and purchase history to make sure the right messages reach the right people at the right time.

CRM is best suited to help businesses use people, processes and technology to gain insight into the behavior and value of customers.

— *DestinationCRM, February 2010¹*

¹ <http://www.destinationcrm.com/Articles/CRM-News/Daily-News/What-Is-CRM-46033.aspx>



- **Boost sales:** Retaining clients is good; cross- and up-selling more of your products or services to them is even better. Opportunity management tools can help you pinpoint which clients may be more interested in upgrades and related offers.
- **Manage leads and subscriptions:** With centralized information on your prospects and subscribers, it's easier to follow up on leads in a timely, effective way and deliver targeted offers to subscribers at the right times.
- **Improve productivity and efficiency without hiring more people:** CRM solutions enable your current staff to manage tasks and communicate faster and more effectively, typically allowing you to achieve more without increasing your head count.

What types of CRM solutions can I choose from?

Whatever you want CRM to include — contact management, opportunity management, marketing automation and/or social media connections — you'll have plenty of options. Today's CRM solutions for small businesses range from do-it-yourself (DIY) systems to Web-based services.

DIY solutions

If you have a tightly limited budget and only basic contact management requirements, start by making the most of your current spreadsheet, email and calendar applications.

For instance, if you use Outlook, you can already combine and manage several email accounts, calendars and address books within a single view. Explore how you can input and share information more efficiently with your current applications by checking the product information available online and consulting your community representative.

You know you need CRM if...

- You have to scramble to find quotes, order details, schedules, etc. when clients call.
- You need a fast, effective way to send new offers and updates.
- You're losing sales, contracts or customers due to untimely communication.
- You'd like a simple way to identify your best customers and prospects.
- You want to determine why your sales team is failing/succeeding on client calls.
- It's important for your whole team to know the who-when-what of client interactions (details of sales conversations, customer support incidents, orders, etc.).
- You're late responding to customer queries.
- You want to figure out the potential value of upcoming deals and projects.

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On-site software

To streamline contact, marketing and sales efforts, or make your contact management system more accessible and responsive to a larger team, consider a software package that you can install on your workstations and host on internal servers (as needed). Prophet CRM, SalesOutlook and Microsoft Business Contact are some of the on-site CRM options designed to work seamlessly with Outlook.

However, an on-site solution can be expensive, and since you'll have to maintain it yourself, it's more advisable for businesses with in-house IT resources. Otherwise, online solutions may be more manageable.

Online services

Web-based CRM solutions, which host and maintain CRM functions online, are a popular option with small businesses since there's no in-house IT burden and they tend to be more affordable. Plus, online solutions are typically more flexible and can adapt more easily as your business grows. Relenta, Infusionsoft, Highrise and BatchBook are some of the online CRM options geared to small businesses.

How do I get started with CRM?

1. **Outline** your CRM-related improvement and automation needs: Better, faster customer service? Understanding who your most profitable customers are? Delivering more targeted messages, more often?
2. **Match** your objectives to CRM functions: contact management, marketing automation and/or opportunity management.
3. **Research** the types of CRM solutions — DIY, on-site, or online — that will meet your objectives and budget while delivering the CRM functions you need.

Need more? We're with you.

Your community representative is always happy to help. You can count on them as a resource for compliance solutions to consider that fit your specific business needs, budget and level of expertise, as well as advice and resources on a range of small business technology issues.

Visit <http://centurylink.com/smb-resources> to contact your community representative, and learn more about how technology can boost your business. You'll find information sheets, videos, case studies and more.

For more detailed information about Customer Relationship Management please refer to the white paper.

Service not available in all areas. Contact CenturyLink for details.