WHITE PAPER

Benefiting from Customer Relationship Management (CRM)

CRM made simpler

Customer relationship management (CRM) can help you make every customer interaction more productive, engaging and profitable. How? With tools that enable you to quickly and easily track your interactions with customers, manage contacts and workflows, customize your marketing efforts and more.

But changing the way you do business is never exactly simple. And when you opt for a CRM system you're not just choosing technology; you're changing the way you and your team approach most of your business processes.

This essential guide will help you align your people, processes and CRM technology with your business goals.

Digital marketing agency SwellPath uses CRM as an opportunity tool

OBJECTIVE

- Organize and manage incoming referrals and word-of-mouth leads.
- Track and analyze opportunities in the pipeline.
- Compare potential deals versus actual results.
- Share the information among all stakeholders consistently and easily.

SOLUTION

- Salesforce CRM for small business.

RESULT

- SwellPath can gauge and act upon opportunities faster and more effectively.
- They are able to forecast opportunities and plan for growth.
- Accidental repeat contacts have been eliminated (saving time and avoiding confusion).
- SwellPath can easily and efficiently educate new employees on the company's sales history, client base and agenda.

See the *Benefiting from Customer Relationship Management* brochure for the full case study

Related guides:

Harnessing social media

Marketing online

Marketing your business offline

Measuring and monitoring marketing performance

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How to get started using CRM

STEP 1: Outline your improvement and automation objectives

Before you can shop for a CRM solution, you'll want to pin down which of your business processes need streamlining: Could you help customers solve problems faster and better if your order information was more organized and readily available? Could you win more business if everyone could see details of sales calls and other customer conversations at a glance? Might automating workflows, emails or full marketing campaigns help you hit the mark?

STEP 2: Match your objectives to CRM functions

TYPES OF CRM FUNCTIONS

- **Contact management**
  Helps you organize customer and company contact details in one place, set reminder alerts for business activities and communicate with customers (via email).
- **Opportunity management**
  Combines 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. Helps you figure out your emerging opportunities and how to make the most of them.
- **Marketing automation**
  Offers anything from automatic personalization and sending of marketing materials to complete campaign tracking. They may help you target customers with tailored messages based on their interests, preferences and purchase history.

STEP 3: Consider the type of CRM solution that will meet your objectives and budget, while delivering the CRM functions you need

TYPES OF CRM SOLUTIONS

- **Do-it-yourself (DIY) solutions**
  Making the most of your current spreadsheet, email and calendar applications.

  If you use Outlook, you can already combine and manage several email accounts, calendars and address books within a single view. (Note: This option assists you with contact management only.)
- **On-site software**
  Opting for a software package that you can install on your workstations and host on internal servers (as needed), such as Prophet CRM, SalesOutlook and Microsoft Business Contact.
- **Online services**
  Choosing a CRM solution that is hosted and maintained online, such as Relenta, Infusionsoft, Highrise and BatchBook.

STEP 4: Ask these important questions to ensure your CRM solution matches your requirements

- **Will the CRM system easily integrate with your current applications?**

  What you need to know: Unless you're opting for the DIY route, don't assume that the CRM system you choose will automatically work with your current applications for accounting, email, etc. If you don't see a list of compatible applications in the CRM product information, contact the vendor and ask.
- **Can you customize the CRM system to your needs?**

  What you need to know: As you use your CRM system, you may find you want to adapt it. For instance, you may want to change certain information fields or add new functions. If you're buying a solution, ask the vendor what levels of customization are available for the solution you're considering. How well you can customize a DIY solution will depend on the limitations of your current software. You may be able to change information fields easily enough, but you may not be able to add new functions without additional CRM tools.

Tip: **Choosing and implementing a CRM system is a major undertaking. Benefits must be defined, risks assessed and costs quantified.**

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- **Will you have mobile access?**

  What you need to know: Do you or your team tend to work away from the office — at home, on the road or other locations? When buying a solution, ask your CRM vendor if (and how) they will ensure your team can use all elements of the system while working remotely. (DIY solutions tend to be less mobile-ready.)

- **Will the CRM system grow with you?**

  What you need to know: Maybe you only need basic contact management right now, but what if you want to enhance your marketing with email automation within the next year? Ask CRM vendors (or a trusted advisor) how the CRM tools you're considering can adapt to potential changes in your business needs. (A DIY solution will require you to seek out new tools as your needs develop.)

- **What's the vendor's track record?**

  What you need to know: If you're considering buying a solution, check each vendor's track record once you shortlist the options (and don't just rely on the vendor's own case studies). Do simple Google and Twitter searches on the vendor and product names to get a more objective view of performance, product updates, service and support.

Top 3 CRM pitfalls

- **No champion, no buy-in.**
  This is one of the biggest risks to CRM success. You must stay involved throughout the launch, setting realistic expectations, then winning (and keeping) buy-in from everyone who will use CRM.
- **It's too complicated.**
  When you choose your CRM technology, make ease-of-use a must-have, and only select features that closely match your needs analysis. Otherwise, you'll own a system that nobody can or wants to use.
- **Messy data.**
  No CRM system will help if the data in it (contacts, orders, invoices, schedules, etc.) is incomplete, out of date or otherwise incorrect. Clean house before you input your data to any CRM system.

STEP 5: Follow these steps for successful CRM integration

Depending on the CRM system you choose, your setup tasks can include inputting or exporting your data, adding users to the system, choosing or setting up your email templates, populating schedules and more. But before you enter a single line of data in any CRM system, you'll need to prepare for the integration. Follow these steps to get a good start with CRM.

1. Introduce the idea of CRM to your team

Get everyone in the business on board with the idea of using a CRM system, explaining the goals and benefits of using it. If your people don't see the value in changing their processes and using a new method, they won't make the most of it.

2. Consult a trusted advisor to match CRM technology with your goals and budget

Although you can easily dive into the Internet to research CRM systems, judging the many levels and types of CRM systems may not be so easy. And what if you already have the tools you need? Could you simply be making better use of email, scheduling and spreadsheet applications (the DIY route)? Let an advisor help you evaluate your technology needs and narrow down the options.

3. Prepare for contract negotiations

When buying a CRM system, you'll want to do a little homework on:

- **Your licensing agreement:** This may cover restrictions of use, protection of intellectual property rights and restrictions on the number and types of users you can have for your system.
- **Your service agreement:** This typically states how the vendor will (or won't) fix any issues, update the service and provide support.
- **The system integration contract:** If you're getting help with implementation from the software vendor or a third party, this typically covers configuration, customization, data conversion and training.

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- **An official description of services and/or features.**
- **Cancellation policies:** How you or the vendor can terminate your agreements.
- **How easily you can transfer your data** if you choose another CRM system later on.
- **Backup policies:** If you're using an online system, will you be allowed to back up your data on your own system as well as the vendor's online system?

4. Map out how you'll measure CRM success

This step often gets lost in the setup process, but it can direct how you use and adapt your system even in the short term. Your CRM performance criteria may include payback calculations (how long you think it should take for your CRM system to pay for itself) and will reflect your business objectives for the system.

For instance, if you want CRM to help you decrease customer service complaints, you note the complaint level you have now and evaluate it again after launching your CRM system.

Note: Give your system a substantial trial period (months, not weeks) before evaluating payback and performance — it takes time to get used to a new system and wield it to its full advantage.

Tip: **Many CRM vendors offer Web-based tools (cloud computing) and software as a service (SaaS), which are accessed via a secure Internet connection and displayed in a Web browser. These applications are sold as subscriptions, with customers not needing to invest in and pay for the acquisition and maintenance of IT hardware.**

5. Take charge

Even if you're simply going the DIY route, or a third party or CRM vendor is supporting the implementation, you'll want to be a CRM champion — a resource people can go to with concerns, questions and feedback.

6. Have a planning kickoff meeting

Have this meeting with your vendor or third party helping you implement your CRM system before they collect your data.

Share your outline of business needs, not just the technical specs, with all involved so that implementation efforts support your CRM priorities. (With a DIY solution, you'll also want to make sure you and the project leader(s) are on the same page when it comes to objectives, schedules, data migration and the tools to be used.)

7. Test before you launch company-wide

Appoint a small test group to use the system for a few weeks before you implement. Not only will this help you work out any bugs, but it will also help you see which aspects of the system will work most effectively for you. If possible, pick people who will use the system for various purposes rather than from one area of your business so you get a complete view of how it performs.

Trends to watch

- **Cloud forecast**
  Cloud computing — accessing software, infrastructure and storage over the Internet — is putting a greater variety of CRM solutions within reach for small companies.
- **Social CRM**
  More CRM solutions are integrating wikis (simple Web pages that can be edited by a number of people), blogs and social networks (like LinkedIn, Facebook and Twitter) to create "a more social model of CRM…[since] customers increasingly expect access, transparency, honesty and collaboration with the companies that they choose to do business with."[3]
- **CRM applications**
  More CRM applications are being developed for a wider range of mobile devices (so you can use your CRM systems efficiently on your BlackBerry or iPhone, etc. as well as your laptop).

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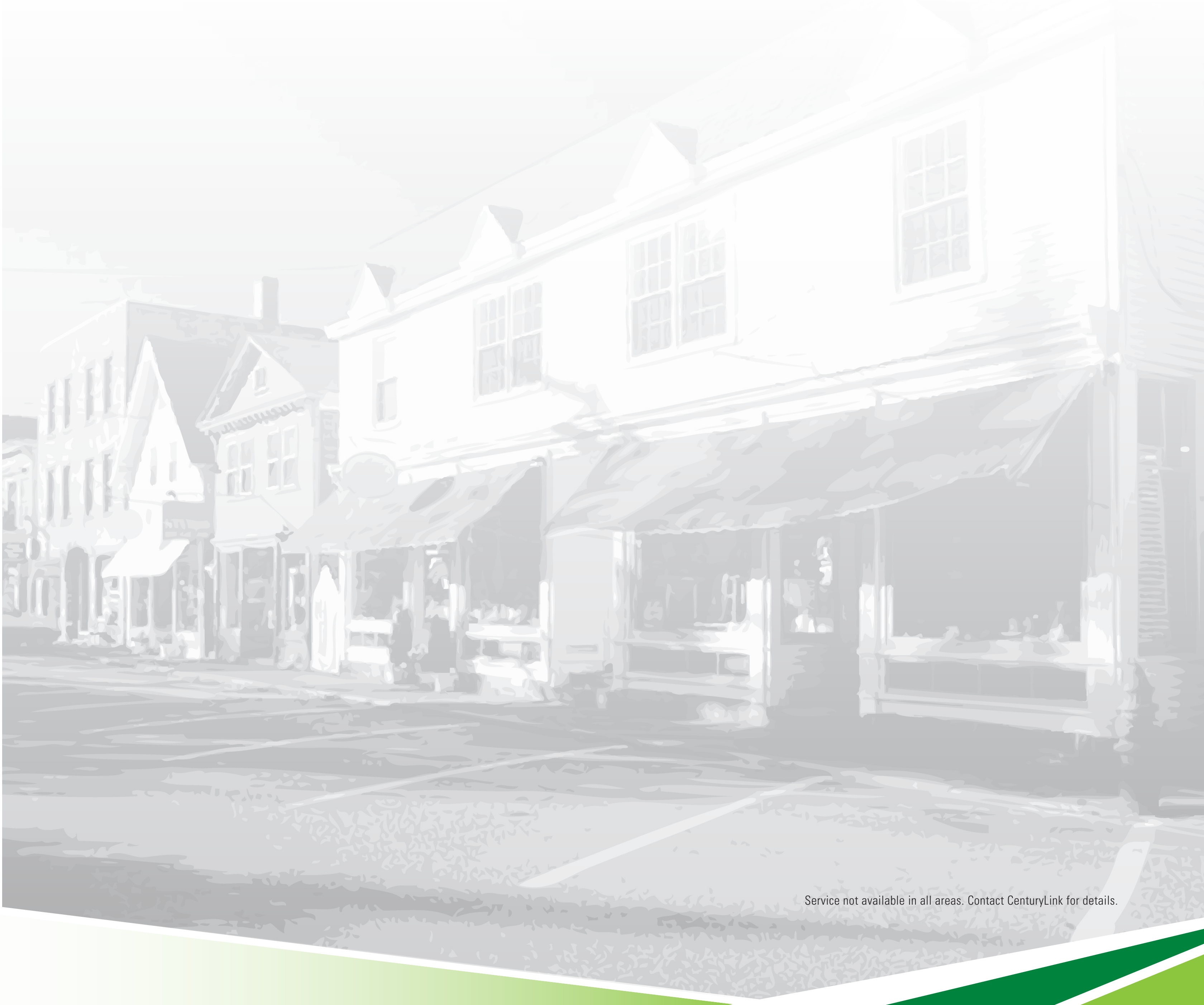
Need more? We're with you.

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.



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