***How To Use Customer Relation Management Software?***

**What is CRM?**

Relationship with customers is very important especially when you are doing marketing or selling a product. To enhance the productivity of your market or business you need to satisfy the customers. Customer relationship management is the strategy that companies use to analyze customers. Main goal of the company is to improve relationships with customers and to drive sales. These strategies help to compile so much data between customers and companies across many points of contact. Data like company, website, telephone, live chat, marketing material and social networks.

**How CRM helps business?**

CRM has benefited many organizations a lot from small businesses to big corporations. It helps to keep all past information of customers like past purchases and interactions with customers that help the new customer to get faster services. Collection of customer data helps the customer relation representatives to group them under their choice and identify the trend. Proper visualization makes their sale more prominent.

CRM software helps to combine all information and data of customers into one database so that it becomes easy for customers to manage it. Many advancements are occuring in CRM systems to make it more useful like use of social media has enlarged the growth of business and making calls to some customers informing them about the deals. Email marketing companies have also helped CRM systems by recording the data and customers' interactions over emails.

**Components of CRM:**

CRM systems with the help of marketing automation can automatically repeat the task in getting more leads. It automatically sends emails to potential customers driving them into fully fledged customers.

Sales force automation traces the pathway of customers and automates certain functions to get more leads and build new customers.

To reduce the tedious job of contact center agent, contact center automation is included in the system of CRM which pre-records the whole conversation with customers. Many AI can be included in the system like chatbots which help them to solve queries of customers and improve their experience.

Geological technologies detect the locations of the customers and set their campaigns based on physical location of customers. Tools like GPS help in getting sales prospects at a particular location.

Lead generation companies help to get more leads for companies and they consolidate and analyse data for leads.

Human resource management is an important factor for CRM strategies as they store many information about customers like name, phone number, address and reviews which benefit the HR department to manage data easily.

Many CRM systems integrate with many other softwares like ERP systems.

Workflow automation helps the business to streamline the workloads of employees and engage them in more advanced tasks.

**Types of Customer Relation Management Software:**

* Conversation CRM:
  + The tools are basically built for the interaction between customers and your team. Emails don’t have to be very long and overwhelming, they should just contain the necessary things. Straightforward emails are preferred.
* Leads and deals CRM:
  + Moving the needle with the sales is what makes CRM worthwhile as business is business and leads and deals is the only thing that matters at the end of the day.
  + That is the reason leads and deals CRM is the most popular type.
* Contract CRM:
  + Connection with the customer plays a very important part. As we know sometimes human touch is what that counts the most.
  + Knowing things about the customer like ,their birthday,their position,or the thing they ordered helps you make a lasting connection.
* Marketing CRM:
  + These are similar to leads and deals CRM. The tools are the same as them , but they also include an automated workflow that helps you send an email automatically whenever you click a link in your website.

**How To Use A Customer Relation Management Software:**

* Adding salespeople :
  + Data can become more and more comprehensive and accurate as soon as you get all the reps on your team.
  + This is the reason for being it a first step in the implementation of customer relation management as it helps you bring in more business with the help of your sales people.
* Customization of settings:
  + Reflecting your sales process is the thing that CRM should do for sure. Accurately mapping to the stage a customer goes through is what it meant. The stages are from “lead” to “opportunity” to “customer”.
  + One requires a good knowledge of these stages. If you have less ideas or are confused about it, first take your time to observe and measure the way candidates buy your products or services.
  + Creating custom properties for storing the data is the next step. Many of the businesses require fields like “Billing Time”, “Time zone” or ”Product Purchased”. Creating these custom properties now is important before you import any existing data.
  + Also you can also set the CRM’s pre-set currency in case you use a different currency.
* Integration of other tools:
  + There are certain things that you should be centralizing in your CRM. These include marketing, sales and customer success for providing you a 360 view on customers and your ideas and also cut down on manual data entry.
  + There are different types of CRM, if you are using HubSpot, few things will be added to your CRM, including leads of who filled out a form ,started a conversion, or the one who performed key actions on the site. This will help in shortlisting the highly qualified from the ones who need more time. Highly qualified can be routed to a salesperson and the other can nurture themselves while working on the marketing team.
* Setting up a dashboard:
  + Giving the right advice and direction is very important to your fellow team and this is only possible when you have a crystal-clear overview of the team’s performance.
  + This can be done by the CRM dashboard and is also very handy. It is more like a control panel that is customizable according to your specific needs.
* Timely reports:
  + If you are a sales manager of the company you have to spend a lot of time looking at the data. Whereas your team should be spending the most of time in selling the products. Hence this is a good idea for fulfilling the small tasks that include weekly/monthly/or quarterly email reports.
  + You could also consider sending emails for adding activities to attract your customers after reading the reports and managing the work more efficiently.

**Conclusion:**

With many advancements in CRM systems, it has become a more augmented database where every information related to customers is stored. Companies struggle a lot when their data is not properly consolidated as it increases a lot of workloads for them but the CRM systems have achieved their goals and have solved a lot of problems. CRM works best with the companies that help them to achieve success.