

16 Steps to CRM Success

How Loyal are Your Customers?

According to Webster's Dictionary, the word "Customer" means one who regularly or repeatedly makes a purchase from a trader. How often do your customers purchase? How loyal are they? And are you doing all you can to increase their loyalty and spending?

No doubt about it, the growth of the Internet has changed our world. And with it comes the opportunity for a new worldwide customer base for a company of almost any size; but there also lurks a greater threat from competitors, who likely now have some of your clients in a new target group. Customers have more choices now than ever before, and they don't have to be loyal to any one company.

Today's competitive differentiator is customer satisfaction. Companies who can satisfy their customers will prosper and survive. Those who can't will fail. It's as simple as that. Successful Customer Relationship Management (CRM) usually begins with Sales Force Automation (SFA). SFA is a computerized way for efficiently managing leads, prospects, customers, selling, forecasting, and reporting.

Although, SFA does improve the efficiency of the sales process, it is only one component of what companies need to do when they implement a customer management strategy. CRM takes SFA to the next level – an overall business strategy that truly integrates sales, marketing and customer service to make the customer the center of the enterprise. Without customers – let's clarify that – without satisfied customers, a company eventually ceases to exist – they might as well have an extended "going out of business sale".



KEY TAKEAWAYS:

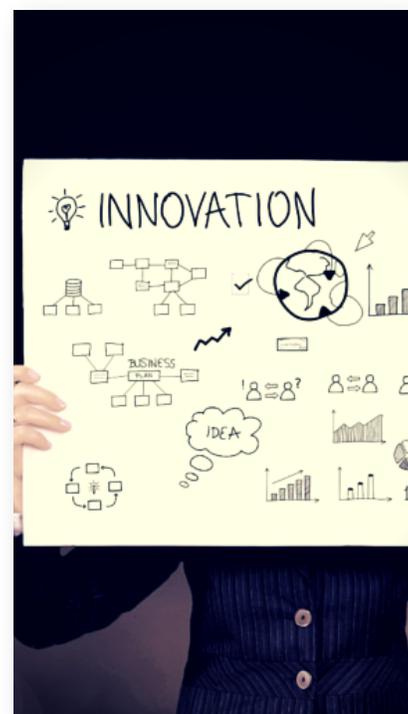
- Define your goals and processes
- Get everyone involved and support adoption
- Determine what data is most important to you and decide what you want to automate

Customer loyalty and retention is tied to the value perceived by the customer in every interaction he or she has with an organization. Each representative from your company who interacts with customers shapes their impression of you. An enterprise CRM system provides an integrated view of a company's clients so customers don't have to jump through hoops (or another company) to have their needs met.

How well you bring a customer-focus to all business activities and leverage customer information will determine your growth. Successful CRM solutions begin with a strong vision into how technology will deliver profits and customer satisfaction. The following steps will provide sales, marketing, customer service executives, (and their CEOs) with a solid plan – for building a successful CRM system.

THE 16 STEPS:

- 1** Get your present sales, marketing, and customer service systems running as well as possible before implementing CRM. If your process does not work on paper, software won't improve it – it will only aggravate it!
- 2** Analyze your company's sales, marketing, and customer service processes with special attention placed on customer needs. After a thorough understanding of this, look for possible ways to equip your staff with automated advantages that are not possible by non-automated means.
- 3** Determine why you want to automate – increased sales, greater efficiencies for sales processes (and other company sales-related processes), improved customer service, better internal and external communications, and a better company image.
- 4** Decide what types of data will be gathered, types of reports will be created and distributed, activities to be monitored, and groups of people affected. Remember, that less is more – make it so by keeping it simple.
- 5** Define your goals – specific and measurable. Set a target completion date. And establish benchmarks for business performance, technical performance, and customer satisfaction.
- 6** Assign a "Super User" as the system administrator who understands processes and the needs of those who will use the information. This person will be your in-house user support person and responsible for data integrity.



- 7 Build a project team committed to achieving the goals. This should include everyone who will use the system either initially or eventually. The team should manage the implementation and remain active after the rollout.
- 8 Get management's support. If senior executives don't use the system, its credibility and the project is in serious danger. Serve management's needs for sales activity feedback and reporting to help get them on-board. (perhaps more simpler and more useful reports).
- 9 In selecting software, involve all people who will use the new system to assure their acceptance, especially the sales and marketing staff. One major reason for CRM failure is sales staff resistance. Sales teams should understand that sales automation and CRM is not to check on their work, but an improvement to overall sales efficiency and is designed to put them in front of more selling opportunities.



- 10 Develop the system so members work efficiently, and as a team. Determine how outside sales works with, and shares information with inside customer support and marketing. Use the system to bridge the gap between sales and customer service support and between sales and marketing.
- 11 Go slowly. Don't rush to do everything at once. Concentrate on your main objectives first. Let one success lead to others. For example, bring the in-house system up and running smooth before adding the outside reps.
- 12 Base your system on available software, using specialized assistance (such as a consultant) when needed. Plan on modular expansion and improvements. There is no reason to wait on "vaporware" or an internal IS staff to develop something – someday.
- 13 Don't let technology and sophisticated systems overwhelm you. Purchase a system with just the features that will help you reach your goals, plus has potential for additional capabilities.

- 14 Allocate enough time and funds for training and training follow-up. Beware: poor results from inadequate training will cost more than money spent on training in the first place. Realize there could be some lost productivity on the learning curve, but this system should be as important to the company as pen and paper.
- 15 Hire an expert for selecting and installing your solution and / or training if your company doesn't have the necessary skills. Note: one of the greatest failures comes from not having enough process and training help. Build a solid partnership with your vendor.
- 16 Keep abreast of trends via conferences, seminars, trade shows, technical publications, and the Internet. Building a solution for the "ideal" customer relationship process is a journey and not an occasional place to visit.

ADDITIONAL POINTS TO CONSIDER

- It's not the software – keep in mind, you can't automate a bad process and expect good results.
- Top management support is vital! Senior managers need not be technical wizards, but they must lead by example.
- Training is critical! Period. End of story.
- Companies who can satisfy their customers will prosper and survive. Those who can't will fail. Simple as that.
- There is no reason to wait on an internal IS staff to develop something – someday.
- Use real business data and real business issues when planning the system.

TO LEARN MORE

Watch This Short Video on CRM Success

ACCELERATING GROWTH THROUGH BETTER SALES AND MARKETING DECISIONS

InfoGrow has a 25+ year track record helping companies accelerate their sales and marketing effectiveness through better decisions.

InfoGrow helps clients identify their best prospects, discover missed opportunities, focus on the most profitable accounts and reduce marketing waste. Our only focus is supporting your efforts to find more customers and keep the ones you want.

Contact us today to learn how CRM Mobile Call Manager can boost productivity, improve processes and close more deals.

InfoGrow

800-897-9807 • Ext. 224

Info@InfoGrowCorp.com

2140 Front Street
Cuyahoga Falls, OH 44221
www.InfoGrowCorp.com