SIX TIPS FOR PUTTING YOUR CRM INTO OVERDRIVE

SUGARCRM

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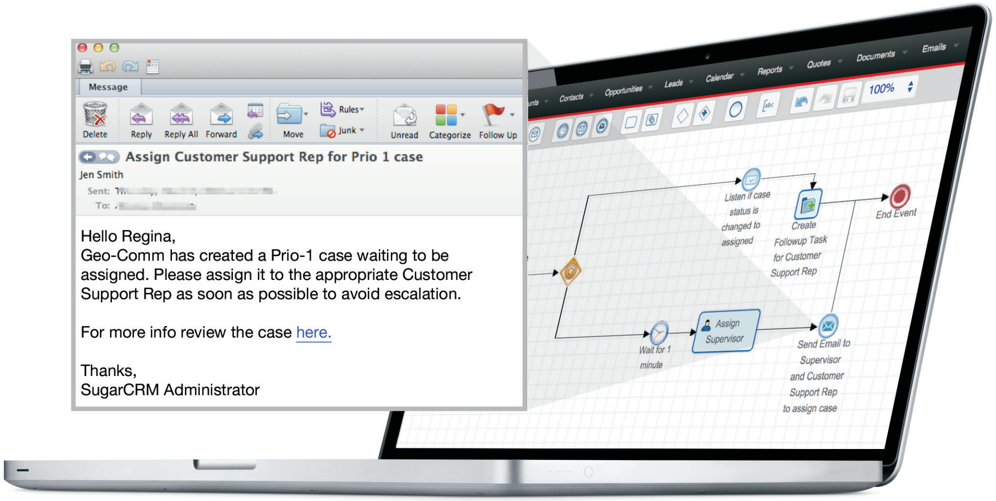
Executive Summary

A customer relationship management system is a critical tool for any organization looking to build extraordinary customer relationships. However, if the CRM is only deployed to a single department, and not automating and optimizing end-to-end customer facing processes, the full value of CRM may not be achieved.

But if the CRM initiative includes every customer-facing stakeholder, and has the ability to manage processes that extend beyond the traditional reach of CRM – the additional benefits can be huge. In addition to the cost savings that come with automation, the increase in customer satisfaction and retention can have a major impact on the bottom line.

So, how can your organization put its CRM initiative into overdrive and see these kinds of benefits? One method is to map the end-to-end customer-facing processes that span multiple departments, and tie them to your CRM to make sure individual interactions with customers are coordinated, and that all stakeholders are armed with the latest customer information at all times. By bringing CRM to the "next level," organizations can break down the silos that separate marketing, sales and support departments – and create a unified view of the customer - allowing every employee to optimize every phase of the customer's journey.

The following are six ways an advanced approach to CRM can help boost your marketing, sales and service effectiveness. Building end-to-end processes can unite every individual that touches the customer, and help you build extraordinary customer relationships.



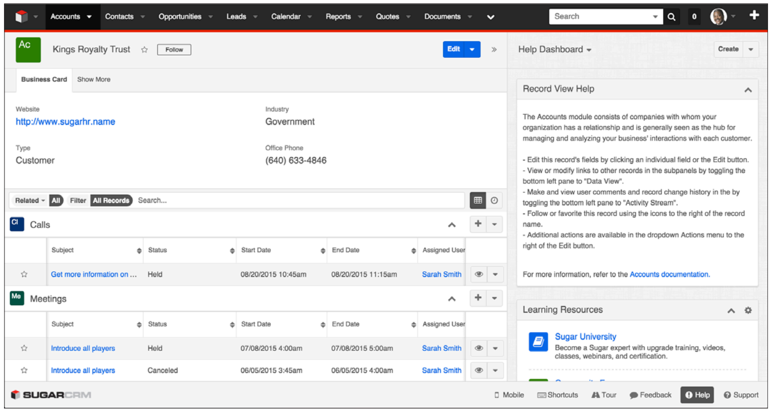
Manage service-level agreements with exact precision with embedded date-driven workflows in your CRM that can power in-time notifications to the right agents.

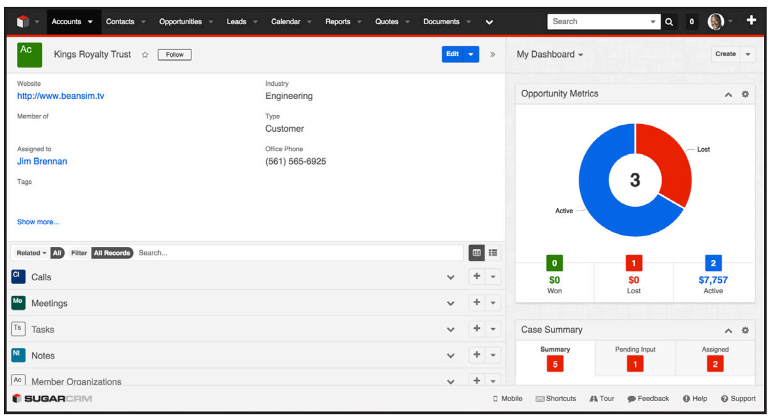
Tip 1: Meet and Exceed Customer Expectations – Every Time

In many industries, the level of support a customer receives is governed by service-level agreements (SLAs). A company's ability to consistently meet the service commitments it makes is critical to winning and retaining customers. But without smart tools that manage the attainment of SLAs, organizations may break SLAs, and their customer's trust, without even knowing it.

Using CRM for automated SLA management helps companies manage performance and consistently exceed SLAs. In fact, a process-oriented CRM can help guide the entire service resolution lifecycle. For example, smart routing can insure a high priority customer issue gets passed to a support rep with a lower case load. And alerts can be triggered if a high priority case is ignored for longer than a few hours before being assigned.

Of course, an advanced CRM should be able to push these smart routing and workflow capabilities to users on their mobile device. This can empower field service agents to make more informed scheduling and other decisions when on the go.





Modern CRM allows for the fast creation of user roles, which can control what data is accessed while giving users faster access to the information they need, when they need it most. The screens above are for the same record – the top image shows a custom view to help a support rep access the most relevant data; while the bottom view shows how a sales rep may need more in-depth data to manage this opportunity to close.

Tip 2: Provide the Right Data, to the Right People, at the Right Time

To become a truly customer-centric company, all customer-facing employees need access to comprehensive customer data. However, when there are so many different departments coming together to optimize the customer journey – a LOT of data can be involved.

That's why a modern CRM should help organizations make more sense of how different users interact with the system. The creation of user types and roles should be simple and effective, and stretch across all user touchpoints including mobile devices. This way, when users across the organization interact with the system – they see only the data that is most relevant to their roles, or to the specific customer moment. There is no more overwhelming deluge of data on the screen, just an intuitive tool that empowers users without wasting time.

Tip 3: Insure More Predictable Cash Flow

While many CRM systems help sales people close deals, they may not actually track whether a customer actually pays. That's because traditional CRM is focused on just the sales opportunity, not the entire customer journey. But in a world where the "subscription economy," or recurring payment models are becoming commonplace, missed payments can lead to cash flow gaps.

But with a modern, process-centric CRM – a few simple customizations can track and manage the payment process, as part of a more inclusive customer lifecycle management approach. Smart workflows and seamless integrations can track against date fields, noting if a payment has been received by finance. When a payment is missed, alerts can be sent to both the customer and a service rep – triggering a follow up call. This can get customers back on track, and keep the revenue stream flowing.

AUTOMATION BEYOND SALES, MARKETING AND SUPPORT

While many CRM initiatives and products focus on marketing, sales and customer support – a super-charged CRM can help automate the complete end-to-end customer journey. With a strong process automation tool in place, organizations can go beyond traditional CRM processes and automate the following:

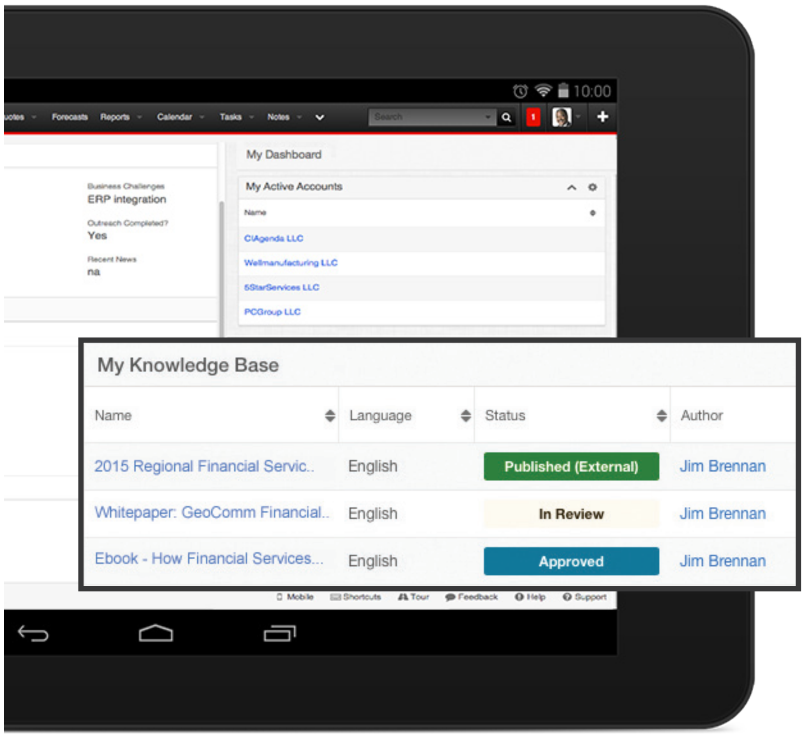
- **Contract Management** – create a smooth contract negotiation process that speeds time to close.
- **Order Management** – optimizing the post-sale process to insure customers get what they need, every time.
- **Service Delivery** – automate the process around post-sale installation and delivery of professional and other services.
- **Claims Processing** - mange both the tracking and integration to financial systems around customer claims, returns and refunds.
- **Purchase Request Management** – insure timely alerts and enforce parameters around purchasing activities.

Tip 4: Faster Delivery Means Happier Customers

Embedded advanced workflow can also help break down departmental silos and automate end-to-end customer processes that extend well beyond the typical scope of CRM. Process management, combined with the proper customer data, can help mobilize more across the organization deliver the highest levels of customer service--even after a sale is made.

For example, advanced workflow tools can help kick off and manage post-sale processes such as order fulfillment, insuring the right products or services are delivered to the customer in a timely manner. This can reduce gaps in service and product delivery, increasing time-to-revenue as well as customer satisfaction.

The right CRM can help prompt sales agents to share the right collateral with prospects based on previous activity, product interest, or where they are in the customer journey.



Tip 5: Better Align Sales and Marketing

Marketing teams might create great product collateral and other tools for sales. But if the sales agent doesn't have a clear idea of what to share with prospects, and when, a lot of hard marketing work can go to waste.

A more forward-thinking approach is to use CRM to align marketing and sales to close these gaps. By using business process management and other business logic in an advanced CRM, businesses can push the right content to a sales rep – based on any number of criteria. This could be based on the prospect's activities tracked by a marketing automation tool, by the customer's previous purchase history, or by identifying where that prospect is in his or her journey and supplying the proper collateral to help them advance to the next phase.

By properly aligning the customer journey with the right sales tools, the sales rep is seen less as "selling" but rather as someone helping the prospect solve a problem with the least friction.

Tip 6: Create a Total Customer View

A super-charged CRM is not a grouping of applications and features. It's an integrated platform that manages all of an organization's interactions with the customer. While many data sources and systems may power that view – the CRM is the nexus tying it all together. It should be a place where anyone who interacts with the customer can immediately see where the customer is in their journey, where they've been, and be a tool for helping them be successful getting to the next phase of their journey.

Not every piece of critical data will "live" in the CRM system. So it's important that the CRM is an enterprise-grade platform that can seamlessly incorporate data from myriad systems into an inclusive, central view of the customer. And that platform must be scalable and non-restrictive – truly able to grow with the increased usage across the organization, and manage ever-expanding volumes and types of customer data to empower customer-facing employees at every phase of aiding the customer along his or her journey.

Conclusions

Many CRM systems address parts of the customer lifecycle, especially marketing, sales and customer service. But many of these offerings are limited by, and even reinforce the departmental silos that make it so hard to truly know a customer across all the touchpoints in the journey.

Modern, flexible CRM can solve these issues. By embedding powerful business processes across all customer-facing departments, optimizing the handoff from marketing to sales, insuring the post-sale experience is done right every time, and simply getting everyone that faces the customer (finally!) on the same page – an advanced CRM initiative can truly take the management of the customer journey to the next level.

SugarCRM

SugarCRM's market-leading Customer Relationship Management (CRM) platform is an indispensable tool for every individual who engages with customers. From sellers, marketers and customer support agents, to receptionists and executives, Sugar provides enhanced intelligence around every user, helping employees make better decisions and create extraordinary customer relationships.

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