

# Take your business to the next level with CRM

16 Ways CRM can  
improve customer  
satisfaction, productivity  
and your bottom line





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# Investing in customer relationships

Many businesses today are facing only modest domestic growth and uncertain global economic conditions, and wise leaders are investing in two areas; automation and productivity improvements to drive profit, and improvements in customer experience and satisfaction to ensure customers are loyal and happy.

Customer Relationship Management (CRM) systems are exactly the sort of technology that improves both these factors; inward-facing productivity gains, and outward-facing customer experience improvements.

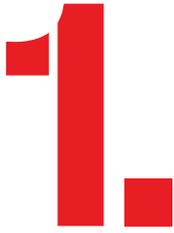
CRM systems have always helped businesses collect, store and organise information about customers, but the latest generation of technology has evolved workflow and analytics functions that help staff and management use that information to improve engagement with customers, streamline work processes, and automate away repetitive tasks.

At SugarCRM, we provide the technology that has helped thousands of businesses increase their employee productivity and improve their customer experiences and in this guide we look at 16 ways our customers are using CRM to grow their businesses.

# Free talented employees from menial tasks

**Anyone who runs a business knows that it often feels like being a circus performer with spinning plates. The better the company performs, the more plates need to be kept spinning, and the closer to disaster it feels.**

**Any one person's time and attention only stretches so far, and employing an army of plate-spinners isn't a sustainable business model. Instead, using technology to automate plate-spinning tasks allows valuable people the time to act on more important things like improving customer satisfaction, responding to competition and developing the future strategy.**



# Automation of daily, weekly, monthly tasks

Important administrative tasks like weekly sales forecasts or monthly KPI reports are a huge drag on people's time. Automating the production of these reports not only reduces the effort required, but reports are available sooner, in consistent formats with better quality data.

# Provide technology support for complex processes

Business processes, especially those that cross departmental borders, often generate confusion, require over-communication from employees on each side, and yet are still prone to errors and disruption.

CRM systems allow staff to share information online in real-time, with automated workflows and checklists that track every required step in a process. This can help to eliminate errors, streamline processes and alert the appropriate people as soon as things are off track. Getting these processes right has the triple impact of reducing rework, improving efficiency of the team and increasing satisfaction of customers who get what they want.



# 3.

## Automated communication

So many workdays begin with email, and reading and replying to messages can take up a significant amount of time. CRM automation and templates can help to reduce this email burden.

Chances are, a lot of information being emailed would be better shared via reports, dashboards, graphs and charts in CRM. And when it comes to updates and alerts, CRM can be set up to send these automatically wherever possible.

Using CRM templates can make emails quicker to draft and easier to read.



# Delegate activities

More work would be delegated if managers felt that they could trust the judgement of their less experienced staff. Automated systems that monitor workflow and activity can ensure that the correct process is being followed.

Automatic checkpoints that prompt supervisors to review work, provide the business with the confidence to delegate complex activities to more junior staff without sacrificing quality or efficiency.

# Information, insights & better decision making

Information is the life-blood of every modern business, and when CRM systems are collecting data and presenting it in understandable form, information becomes insight into how to drive company performance and set strategy for future success.

# Prioritise customers by value

**There are always some customers that are more important than others. It could be the current profitability of the customer, their potential future sales, their lifetime value, or some other combination of factors. But so often the best customers get treated the same or worse than the worst customers. Often your valuable customers leave quietly, while your attention is distracted by the most vocal ones.**

A large, stylized white number '5' with a period, centered within a solid orange square. The background of the entire page is a light gray grid of squares.

# 6.

## Provide service via multiple channels

Not all customers want the same level of service. Some will be satisfied or even prefer to engage over digital channels like email or web, whereas others will expect high-touch service via phone or in person.

Having the ability to serve customers in different ways, and knowing what different customers prefer, lets you invest more in your best customers while reducing the overall cost of service.

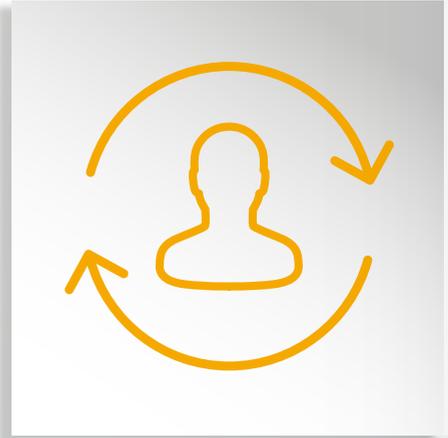
# Improve effectiveness of marketing programs

It is said that half of all marketing spend is wasted, and that the trick is to work out which half. The explosion in marketing technology and new communication channels only makes this harder.

Having accurate data about what marketing programs are driving what new sales, provides visibility into which half. CRM systems play a critical role as the only place where all customer activity is recorded, bringing together information from all marketing channels in one place.



# Implement customer retention programs



It is generally accepted that it is more expensive to acquire a new customer than it is to retain an existing one. Data-driven analysis of customer behaviour and satisfaction helps your business identify which customers might be at risk.

When risk is assessed against the value of each customer, it becomes much easier to prioritise actions, directing the appropriate investments to each individual customer or segment.

# 8.

# 9.

## Develop new products & services

**Staff responsible for developing new products and services so often have to rely on instinct and conjecture. Equipping them with data from CRM about the fastest growing market segments, and products or sectors where sales are dropping off, gives insight and evidence to make better decisions.**

**Furthermore, the qualitative records of conversations between customers, sales, and service teams provides insight into why markets are changing and how the business can respond.**

# Digitalisation & the accelerating trend of moving business online

We're immersed in an increasingly digital economy. Businesses of all sizes are challenged by what it means to move online, and how to capitalise on the opportunity this provides. CRM systems provide the foundation on which digital business is built.

# 10.

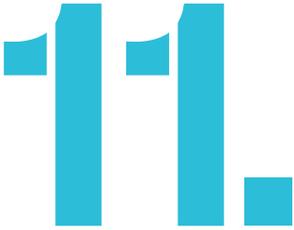
## Use online lead-capture forms

**Interactions with customers through online channels are becoming a normal part of doing business.**

**To efficiently process customer enquiries, collect customer enquiries from web sites directly into the CRM using online lead-capture forms. Use workflow processes to alert the teams that need to know, and track every precious lead to ensure it is followed up in a timely fashion.**

**This information makes it easier to analyse what is driving customer behaviour and how to automatically route each enquiry to the appropriate people in your team.**

**Use the web forms on your site or other sites to also capture extra details such as the page they were looking at when they filled out the form, the page that referred them to the web form, and even what ads they've seen. This sort of data is invaluable when determining what marketing campaigns are driving response.**



# Move customer service online

Online customer service portals let many customers solve their own problems through frequently asked questions and searchable knowledge-bases. Customers are often more satisfied when they can solve their own problems quickly, rather than having to wait for a phone call to be answered or an email replied to.

When customers can't solve their own problems, enabling them to log a support case online and immediately providing a support reference number, gives them confidence that their problem will be resolved. It also establishes a way of communicating that is convenient and efficient for both the customer and the service team.

# Automate your marketing

Marketing Automation solutions are great at improving the performance of digital marketing programs, but they are dependent on a strong underlying CRM system as the source of truth for all customer interactions. CRM becomes the place where your marketing team can report, consolidate results and analyse financial outcomes regardless of the marketing technology or channel being used.

# 12.

# Sales effectiveness

All sales teams have opportunities to improve performance by working smarter, using data to improve decisions, and automation to guide activities and increase productivity.

# Adopt best-practice sales processes

**Not all salespeople will have the instincts of your best performing representatives whose innate talent or years of experience set them apart.**

**Using CRM to look at the behaviours of your best salespeople can help identify what makes them successful. Then using the CRM system to drive these same behaviours across the rest of the sales team, and promote wider adoption of best practice, can significantly lift the performance of the team.**



**13.**

# 14.

## Prioritise activity

Too often even the most dedicated sales representatives will find themselves so emotionally involved in a particular account or opportunity, that they lose sight of where their efforts will be most effective. It's the role of any good sales manager to sit with each of the salespeople to look at their activities and coach them to work smarter, putting effort in the right places.

But sales coaching often gets bogged down in simply reporting what progress has been made on every account, which can be tedious and frustrating for both the sales representative and their manager.

Using CRM gives sales managers visibility into salespeople's activities, and offers the chance to shape the quality of the conversation. Sales meetings move from being simply about updates, to constructive conversations about strategy, planning and prioritisation.

# Increase face time with customers

The most valuable time any salesperson spend, is when they are speaking with a customer. Every minute a salesperson spends in the office preparing reports or putting together proposals is time they're not spending with customers.

And this problem is magnified by salespeople building bad habits. The more time they need to spend doing admin, the more admin becomes a habitual exercise and an excuse to not be out spending time with customers.

When CRM automates and streamlines the creation of sales reports and the preparation of proposals, salespeople are free to focus on finding and closing business.

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# 16.

## Provide visibility into your sales pipeline and forecast

**Running a business can feel like driving a car too fast on a winding road, looking only in the rear-view mirror.**

**Using CRM to review upcoming sales opportunities and future performance provides a chance for the leadership team to see what's in front of the business and make decisions accordingly.**

# Make a map & get started on your CRM path

CRM can provide business improvements across all aspects of an organisation, but you can't make all these changes at the same time.

Identify the top challenges facing your business, find the low-hanging fruit that will provide the greatest results in the fastest time, and use that success to carry momentum through the subsequent phases of your CRM program.

Get hold of our "Features that matter" guide to help you take the next step.



# Contact

**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.

Are you ready to challenge the status quo with modern CRM?  
Start at [www.sugarcrm.com](http://www.sugarcrm.com)

