WHITEPAPER

USING CRM TO Sell More

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C2CRM™
Clearly Different. Clearly Better.

Defining Customer Relationship Management

The most successful companies today consistently demonstrate the ability to identify, understand and cater to the needs and demands of quality customers. Top executives see forging long-term relationships with premium customers as the key to stability in an increasingly dynamic market and consequently are driving their organizations to become customer centric.

This approach to identifying premium customers, understanding their complex needs and aligning your organization's capabilities to meet those needs is a fundamental concept of Customer Relationship Management. Gartner Group defines CRM as:

> *"…a business strategy whose outcomes optimize profitability, revenue and customer satisfaction by organizing around customer segments, fostering customer-satisfying behaviors and implementing customer-centric processes."* – **Gartner Group**

INTRODUCTION

This document is written to address the specific issues related to CRM and Sales Professionals. When considering a CRM solution, it is critical to understand the needs of your sales team members and how they would utilize this CRM application on a daily basis. As you most likely already know, a sales person has a set routine which is relied upon during the typical selling day. It could be suggested that successful sales people should NOT be taught to change their selling style if it is that style which contributes to their success. However, every successful sales person is typically armed with proper marketing and selling ammunition which, hopefully, compliments their selling style.
This understanding should be an essential consideration when evaluating the use of an enterprise-wide, mid-market CRM solution. CRM software should be deployed as a supplement to the selling process, not a hurdle. All too often, CRM applications have too much depth and complexity and as a result, they are not utilized on a regular basis. You can ask any number of sales people who are currently using a CRM solution and many may tell you that they typically use about 1/3 of the features it offers. Why? Because, many of the features in some upper-tier CRM systems do not supplement the sales process. In fact, some features may INCREASE the effort of the sales person to close a sale. The remaining portions of this white paper are focused on issues that can help you avoid implementation of a CRM solution that does NOT fit your needs or the needs of your sales team.

FINDING THE PAIN IN YOUR SALES ORGANIZATION

The critical element to introducing an appropriate CRM solution stems from identification of the pain currently being experienced by the sales people in your organization. For the purpose of this discussion, let's define pain two ways: 1. as a process or regular encounter which causes excess work for the sales person and 2. the ramifications for another employee or department which stems from a process or act performed by a sales person. In both cases, the pain causes unnecessary expenses and lost productivity for the organization and the employees involved.
Pain can manifest itself in a variety of ways during the normal work day of a typical sales professional. Let's examine some common pain associated with the sales role and how CRM can help solve these problems.

pain

Sales people typically hate to compile the weekly, sometimes daily, reports regarding their pipeline and their opportunities. How many times have you had to "go over your list" in a meeting after having to manually account for the status of each prospect. This accountability is a painful activity which sales people can expend a tremendous amount of time compiling. As a result, too much time is wasted reviewing notes, looking back at information regarding individual sales calls, etc. This pain is also felt at the management level. Having to call regular meetings to go over each salesperson's pipeline in the effort to create realistic opportunity reports can be grueling process.

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CRM CAN HELP

In a well-designed CRM solution, reporting should be real-time allowing managers and executives to view instant status on leads, opportunities and closed deals from their own computer. These real-time charts and graphs must be able to "drill down" to the actual opportunity for a detailed examination. For example, Joe, the Sales VP needs to get a report on anticipated revenue for the month of August. Using C2CRM, Joe can access his customized Portal and click on a graph which depicts real-time revenue projections by region and/or sales rep for each remaining month of the year. Moreover, Joe can pull a report detailing the individual stages of each opportunity and their likelihood of closure. This could all be done without having to call a meeting or asking the sales people to provide reports. It saves Joe and his team time and effort. Furthermore, Joe's sales team can access their own information from their own customized portals to help them get a feel for their pipeline and help them decide which opportunities need more attention. Below is a screen shot from C2 which represents a customized dashboard showing an example of this scenario.

pain

LEAD DETAILS AND FOLLOW UP

Practically any sales professional will tell you that timely follow up on leads is a crucial component to closing more deals. However, they might also say that it is oftentimes the most neglected component of the sales process. It's so easy for a sales professional to get lost in a sea of leads (both warm and cold) and forget timely follow up and repeated contact. The pain is trying to juggle follow up calls with cold calls and remembering all of the pertinent information for each lead. This can cause errors and lost opportunities which costs the company money and new customers.

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CRM CAN HELP

Utilizing a common contact manager is a simple way to help build in reminders for follow up calls. However, a true CRM system should have a built-in "conveyor belt" which can be "activated" to send regular communications to leads, prospects and suspects in the system by simply tagging the lead. For example, if you have a lead who is interested in product A, and after the initial contact, the lead says that they may be in a

position to buy next quarter, then with C2CRM, you can tag them to receive regular communications regarding product A over the next 3 months. This targeted "conveyor belt of information" can include reprinted articles on product A, brochures, reference stories, personal letters from other product A users, and other key pieces of collateral. Your C2CRM handles the process of follow up via email to help keep your products top of mind with the prospect. Then C2 tells you when you need to call them back to move the sales process to the next step. With built-in notes, you'll be able to keep tabs on each conversation you have with the prospect and indicate any possible hurdles you will have to overcome in order to close the deal.

pain

CREATING QUOTES AND PROPOSALS

It is not particularly easy to get a prospect to the quote stage, but once you get them there, creating the quote or proposal should not be a difficult and time-consuming process. Once again, many sales professionals will confess that creating quotes and proposals on the fly that include all necessary components of a sale can take much more time than it should. This is painful for the sales person who is trying to get a warm prospect to close. At this stage in the sales cycle, speed and accuracy are critical.

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CRM CAN HELP

CRM software, such as C2CRM, can create complex quotes in minutes. These quotes and proposals can be linked to the details of any opportunity in the system. As a result, your sales team members would be able to generate new quotes and proposals, copy existing ones, or import values from any configurator which provides text-based output. The pain is removed by making the quoting and proposal stage instantaneous. Added value is realized in bidding situations where the speed of delivery can give you a competitive advantage over others bidding for the sale.

pain

PRIORITIZATION

All too often, sales professionals end up wasting too much time on leads that never had a chance to close, versus leads that could genuinely bring in revenue. Strong lead qualification is important, but more importantly, lead classification can help a salesperson keep track of which leads are moving forward and which are not.

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CRM CAN HELP

A CRM application can provide comprehensive information about the status of a lead. It is so much more than just good note taking. A CRM solution can offer stages within the sales cycle which sales professionals can call upon to properly tag a lead. Once tagged as being within a certain stage of the sales process, it becomes easy to prioritize leads based on how close they are to closing. This lead classification is designed to give the sales person a common point of reference for each lead in the effort to not only keep track of his or her leads, but to communicate their status to others. A CRM system can empower each sales professional to properly prioritize their leads and shorten the sales cycle.

pain

GETTING QUALIFIED LEADS

Perhaps one of the most painful issues for a sales professional is trying to get new leads. In many cases they have some support from the Marketing efforts within their organization, however, automating the process can speed up the lead distribution and follow up. The root of this pain comes from the sales professional feeling out of control and out of touch with the lead generation process.

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CRM CAN HELP

A CRM system can provide immediate distribution of leads from multiple sources. This process is automated and provides the sales professional key information as to the source of the lead and when it was generated. For example, C2CRM can integrate to your company's website. In effect, it now becomes an automated web activity tracking system which can identify web site visitors and alert the appropriate sales representative in real time. The sales rep receives all leads that are generated via the company web site instantly. In this process, the web site visitor registers to download product information and that lead is immediately populated into C2CRM and routed in real-time to the appropriate representative. This allows the representative to contact the prospect WHILE they are visiting to help answer any questions. Furthermore, web site visit information is documented automatically allowing the sales rep to better gauge a prospect's interests based on their navigation through your site.

pain

INTERNAL COMMUNICATIONS

Perhaps the most overlooked "pain" that a salesperson deals with on a regular basis is related to misinformation. Consider the situation in which a salesperson calls upon a current customer in the effort to encourage a repeat sale. However, without knowing the historical background on this current customer, the salesperson may unknowingly step into a bad situation. The customer, for example may have recently called with a support problem. Furthermore, he/she may have other product issues that would reduce the likelihood of an additional purchase. The pain stems from a lack of information which caused a miscue within a sales opportunity. The result? An angry customer and an unsuccessful selling attempt which wasted time.

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CRM CAN HELP

In this scenario, an enterprise-wide CRM solution would have allowed the sales person to view the historical information on the customer PRIOR to making the sales call. For example: C2CRM maintains comprehensive customer service information for each record. If a customer calls into support regarding a particular product, the service representative can enter details regarding the nature of the call. From that point forward, others can view this detailed information and get any needed information regarding the history of the customer.

All of these C2CRM functions will help sales people get leads faster and react to them immediately. But more importantly, it automates the lead capture process using the Internet in the efforts to increase lead generation and distribute those leads appropriately.

This same situation can apply to targeted marketing and sales initiatives. A sales person or marketing professional could pull reports on various activities or product purchase history of any individual or group of customers within the CRM system. Once this report is created, the salesperson targets those customers which have purchased a particular product or service and cross-sell a related product. The historical information for each customer would be readily available to help the sales person during the sales process. CRM gives different people within different departments the ability to view customer information and historical data on the fly. It's a valuable resource which helps improve internal communications and promotes consistent customer interaction.

SUMMARY

Selling in today's business environment is more challenging than ever. CRM is a key component to helping a company get MORE out of their current customers and find MORE new customers that have similar attributes of their current buyers. Now, more than ever, keeping customers and finding new ones is paramount to being competitive or, perhaps staying in business. A CRM solution can provide enterprise-wide access to critical information. In the case of a sales professional, it can offer a concise and simple means for keeping track of leads, both hot and cold, and customers.

From a sales professional's viewpoint, a CRM solution needs to have a minimal learning curve while helping to streamline his/her job…not adding work to it. If any organization is going to be able to gain the true benefits that a CRM solution can provide, people need to USE it. That issue alone can be the biggest pain for a salesperson.