

THE MARKETING FRONTIER

IMPLEMENTING
MODERN MARKETING
STRATEGIES

V5

WHAT
IS
A
CRM?

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CRM stands for Customer Relationship Management.

According to Salesforce:

"Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships to grow your business."

In order to achieve this goal, you will need to utilize a CRM software, which is the specific technology that allows you to manage all your company's relationships and interactions with customers and potential customers from one location.

In this white paper, we will be exploring CRM software in greater detail and outlining why it is vital to your organization's success.



WHAT IS CRM SOFTWARE?

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CRM software is the tool used to manage not only customer data, but customer relationships.

According to Hubspot:

“CRM software is a system for managing your relationships with customers. You can use CRM software to keep track of interactions, data, and notes about customers or potential. The data is stored in a central database and is accessible to multiple people within an organization.”

This software allows you to then identify sales opportunities, keep a record of specific service issues, perfect your targeted marketing campaigns, and more, all from one location.

Not only does this centralize your data, but it also makes that data accessible to multiple departments across your company, like your company's digital file cabinet.



WHO USES CRM SOFTWARE?

WHO USES CRM SOFTWARE?

CRM software can be utilized by everyone in your company, including sales, marketing, business development, customer service, management, and more.

SALES

For your sales department, CRM software helps your staff to better understand the sales pipeline and make informed decisions about which leads to target.

MARKETING

Marketing can benefit from CRM software to see which campaigns were more successful than others and to optimize targeting of those campaigns.

CUSTOMER SERVICE

For customer service reps, a CRM tool allows them to see all the information about a specific client in one location, streamlining the communication process.



WHAT DOES A CRM DO EXACTLY?

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To put it simply, a CRM system allows you to build lasting, reliable relationships with your client base.

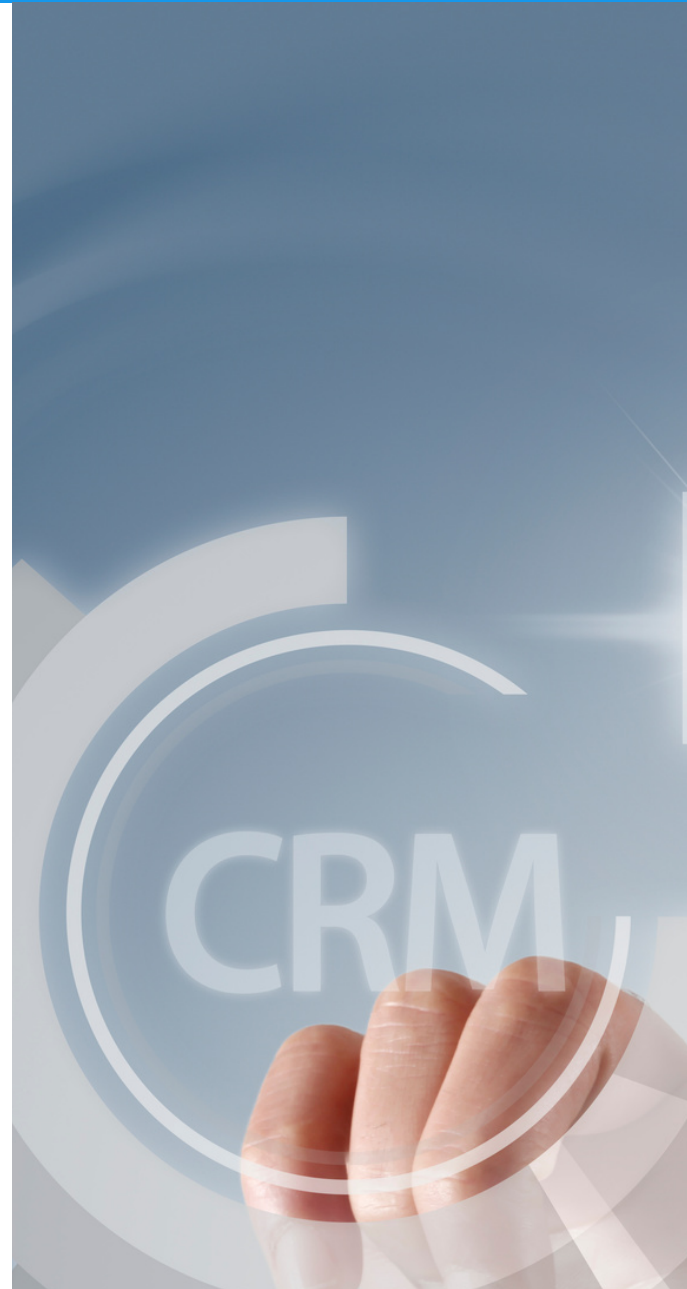
According to Salesforce:

A CRM system “helps you find new customers, win their business, and keep them happy by organizing customer and prospect information in a way that helps you build stronger relationships with them and grow your business faster.”

But what data is collected?

A CRM can collect and store the following information:

- Client or Prospect's Website
- Email Address of a Point of Contact
- Phone Number for that Contact or the Company they belong to
- Social Media Channels of that Contact or Company
- Recent News
- And More!



BENEFITS OF CRM SOFTWARE

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There are a myriad of benefits to using a CRM software for both your client relationships and for your company internally.

BENEFITS OF A CRM SOFTWARE

- Easier access to client and prospect data
- Easier collaboration between departments
- Increase in productivity company-wide
- Faster communication with clients, prospects, and other departments within your company
- Reduction in clutter and unnecessary paperwork
- Improvement in customer satisfaction



BENEFITS OF CRM SOFTWARE

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DATA SYNCHRONIZATION

Using a CRM, all departments and workers are working from the same depot of information and simultaneously updating information for use by everyone in the company.

It is common that departments in companies not using a CRM have separate data sets, that can often cause data conflicts and even production and shipping issues. I.e. if a purchasing manager changes at a company and production notes it accordingly in their files, shipping and purchasing may not be notified and create order problems, or if they are notified, it requires multiple actions for a single update.

VISIBILITY

Simply stated everyone that has been assigned permissions, can see the history of client and internal communications related to that client. No more searching separate lists, spreadsheets, databases, file cabinets, and/or email inboxes to get the full picture.



BENEFITS OF CRM SOFTWARE

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INTEGRATION

CRMs can integrate with other technology to automate record keeping and notifications. Sale and inquiries from Websites, email marketing, Adwords, and most online ads. Deeper integration can connect the CRM with virtually any business software; HR, accounting, and customer service. This integration not only improves productivity, but insures accuracy, and allows for better business planning as all key players have all the facts at their finger tips.

PERMISSIONS

CRMs can be setup to allow team members access to view and/or edit data as appropriate allowing employee access to data required to perform tasks while protecting data integrity with edit permissions. Not everyone in the company requires visibility to all information and CRM's allow this to be customized as needed.



WHY YOUR BUSINESS NEEDS CRM SOFTWARE

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As more prospective clients are looking to do business with companies that are customer-focused, it is vital to adopt a CRM system that works for you and puts customers at the forefront of your strategy.

According to Salesforce:

“If your business is going to last, you need a strategy for the future that’s centered around your customers, and enabled by the right technology.”

Utilizing a CRM system allows you to do just that by giving all members of your team a clear view of your customer base in one convenient location.

Additionally, a CRM system can streamline your internal processes, allow management to better track productivity company-wide, and allow departments to work together more efficiently through the creation of workflows.



WHY YOU SHOULD WORK WITH AN AGENCY ON YOUR CRM STRATEGY

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Implementing a CRM strategy can be challenging as there are many parts to consider. This is why teaming up with an agency on your strategy can save time and increase the odds of generating solid leads.

BENEFITS OF WORKING WITH AN AGENCY

- Expertise
- Resources
- Industry Experience

EXPERTISE

An agency can offer the combined, specialized knowledge of their team, who work day in and day out with CRM software successfully.

RESOURCES

When working with an established agency, you gain access to the industry-specific resources that agency has access to.

INDUSTRY EXPERIENCE

Along the same lines as resources, an established agency not only has experience creating CRM systems for themselves and other clients, but can also apply that experience to new projects.



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IMPORTANCE OF CHOOSING THE RIGHT AGENCY

DON'T LOSE CREDIBILITY BY TRYING TO DO IT WITH LIMITED TIME OR BY CHOOSING THE WRONG AGENCY

Implementing these strategies yourself or choosing an agency to help develop and implement your CRM system can be vital to your campaign's success.

POTENTIAL PITFALLS

- Low follow-through & loss of leads
- Lack of quality
- Damaged Reputation

LOW FOLLOW-THROUGH & LOSS OF LEADS

Responsiveness is vital to a company's success. If you don't have the time after the program is launched or if you are working with an agency that does not put emphasis on timely follow-through, it could damage your reputation and cause leads to seek out other solutions with your competition.

LACK OF QUALITY

Finding the time and people to implement your CRM the right way is critical and working with an agency that performs poorly will cause your business to lose market standing and authority.

DAMAGED REPUTATION

Ultimately trying to do it yourself without enough availability or working with the wrong agency can hurt your company's reputation which will make it harder to earn new business moving forward.

