



SATISFYING YOUR CUSTOMERS

*Best Practices and Technology that Anchors Your
Business On Customer Loyalty*

Part 2

Supercharging your Strategy with CRM Software

Customer Relationship Management software is a tool to support a customer-centric business strategy, enabling companies to acquire and retain more profitable customers. In simplest terms, CRM provides visibility into the buying patterns of your most loyal customers. This enables your marketing and sales teams to fine-tune messages, and calibrate special offers and sales tactics in a way that maximizes return on investment.

CRM automates the scheduling and production of many routine sales and marketing tasks, freeing up time for managers to focus on larger strategy. It also provides critical customer information to all of your customer-facing employees so that your sales and customer service representatives present a unified, informed face to the customer.

The analysis provided by CRM systems can help you quickly move your company into a growing market, or reveal if your current market is shrinking. And by giving you visibility into the quality of marketing opportunities and close rates for sales, CRM enables you to identify weaknesses and prevent sales or marketing departments from engaging in the 'blame game' instead of increasing effectiveness.

3 critical areas of functionality, plus the metrics and analysis to support them, combine to create an effective CRM software system:

1. Improved Customer Service

When a customer contacts your company, CRM enables the customer service team to know exactly how to help. Each rep has instant access to information concerning what marketing offers the customer has received, who he or she has worked with in sales, what products or services were purchased in the past, and the current status of any open orders, service contracts, etc. By gathering all relevant customer information into one centralized system, you ensure that customer service representatives will ably assist customers and enhance their overall impression of your company.

2. Sales Force Automation

CRM automates sales activities for greater efficiency and a higher close rate. Tools typically include robust contact management functionality with customer notes and scheduling, proposal or quote generation tools, and the ability to share information across the organization and via the web with mobile sales representatives. Sales managers enjoy a more efficient pipeline with automated distribution of sales leads, as well as real-time reporting to measure results and identify opportunities for improvement.

3. Marketing Automation

The marketing department uses CRM to identify profitable customer segments, match tactics to customer preferences, and increase response rates. Functionality usually includes campaign creation, scheduling and monitoring, as well as list segmentation, and marketing metrics. By better capturing information about the response patterns of customers, marketing uses CRM analysis to both lift response rates and generate a better marketing ROI.

Executive Considerations

As you begin to implement customer-centric sales and marketing practices and evaluate CRM software systems, there are several things to consider. A consultant who specializes in CRM can help you evaluate your current customer-facing business processes and select CRM software that aligns best with your business objectives. Software solution providers are uniquely qualified to guide you through the process of defining your technology requirements. Your consultant can also help you implement and test your new solution, migrate existing customer data, and train your employees for a successful start to your CRM initiative.

CASE STUDY: DIGITELL, INC.

TIMING IS EVERYTHING WHERE SALES IS CONCERNED!!

Challenge: Burdened by an inefficient, manual system, Digitell Inc., a multi-media company, struggled to manage a rapidly expanding customer database and a burgeoning sales /marketing pipeline.

Solution: Sage CRM with customized screens and fields, data imported from spreadsheets, sophisticated calendar and tickler features, and complete sales, marketing, and service automation.

Results: Digitell can now better manage its pipeline, provide enhanced customer service, optimize sales opportunities, and manage marketing activities with confidence.

“Timely contact with prospects and clients has helped us land new accounts. If we were still relying on our old manual processes, we would risk losing business to someone else.”

~Steve Parker, Vice President.

Depending on your IT capabilities and resources, you may prefer to use a hosted CRM solution, or implement an out-of-the-box solution on internal servers. Sage Software offers both in-house and hosted CRM solutions, affording customers the choice to initially implement a hosted solution and later deploy the same solution in-house without having to retrain employees.

CASE STUDY: USCO LOGISTICS

CRITICAL INFORMATION IS ESSENTIAL FOR BULLS-EYE TARGET MARKETING!!

Challenge: USCO Logistics needed a complete view of its customers and prospects for more efficient management and planning.

Solution: Consolidation of USCO's seven databases into one using Sage CRM was necessary in order to make company wide communications more effective.

Results: Critical information is now shared throughout the company. Selling and management processes have been simplified and automated, allowing long range planning using sales pipeline and forecasts

“We are lights years ahead of where we were, in terms of being able to manage and share critical information, and quantify and target our marketing campaigns. Sage CRM has really revolutionized our operation.”

~Mary Ann Jacob, Director of New Business Development

You should also look for a solution that is flexible enough to meet your needs today – and tomorrow. You will want your CRM solution to integrate easily with accounting and third party applications. As your company grows, you may wish to expand your CRM feature set. Choose a solution that offers integrated modules for an affordable way to scale your CRM to future growth. You can implement functionality to meet your needs now while reserving the ability to quickly add features in the future. Other aspects of flexibility include wireless features for mobile sales reps, remote access for off-site employees, and e-commerce capabilities.

CONCLUSION

Companies today cannot afford to use a cookie-cutter sales and marketing approach with all customers. Your best customers are your company's key to future profitability and growth. It is imperative that communicate with each of your best customers in a thoughtful, personal manner. Carefully managing your customer relationships will result in more sales opportunities, higher customer satisfaction, and beneficial word-of-mouth marketing.

CRM solutions are an indispensable tool in your effort to move your company to a customer-centric business model. Software is not all that is needed in a CRM initiative; executives must firmly and enthusiastically set the tone for a new corporate culture. By adopting a CRM solution, you'll gain new visibility into the buying patterns of your most profitable customers. This enables the sales, marketing and customer support departments to fine-tune tactics to better enhance customer loyalty and attract high-quality new customers. A solid CRM strategy can create a highly-profitable, competitive edge for your business.

Features to Look for in a CRM System

- Sales cycle analysis
- Integration to your back-office accounting system
- Open, industry-standard technology
- Seamless flow of information between corporate systems and remote employees
- Real-time reporting and analysis
- Automated workflow
- Contact and campaign management
- Multiple language and multicurrency capabilities to support global business
- Ability to easily customize your solution to fit your business needs
- Scalability to accommodate future business growth



About Axis Global Partners

AXIS Global Partners (AGP) is comprised of experienced and passionate professionals that assist small and medium sized enterprises perform at the highest levels so they can create sustainable value for their customers and stakeholders. From strategy to execution we listen to your needs and strive to deliver solutions that exceed expectations.

WHY WE'RE DIFFERENT

Leadership: A company where employees are proud to work, and customers, partners and suppliers want to do business with.

Team: Our team of consultants and teaming alliances allows us to deliver consistently exceptional service to our clients anywhere in the world.

Methodology: Our proven methodology provides our clients with a blueprint and set of business tools for closing the gap between actual and potential performance.

Approach: Our approach delivers measurable results by achieving predictable quality—while radically reducing costs, mitigating risk and improving client satisfaction.

Focus: Our focus to solve your most pressing challenges fuels our passion to deliver innovative and effective solutions.

Integrity: Our people inspire trust by taking responsibility, acting ethically and encouraging honest and open debate.

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