

Customer Relationship Management (CRM)

A guide and handy implementation tips

Customer Relationship Management is not about technology.

It's about people – the people your business relies on. It's a tool for bringing your staff and customers together in ways that will make your business goals a reality.

Smart solutions based on innovative technology and an intimate knowledge of your business are the foundation for CRM that really works.

What is CRM?

- CRM is a strategy that encompasses your whole business, reaching each and every customer touch-point.
- It empowers employees through information.
- It ensures you can make the right decisions for both your company and your customers, enabling your business to become more competitive.
- It must be beneficial to both your business and your customers, reducing internal costs and increasing customer loyalty.
- It requires the right technology to provide decision makers with accurate information at all times.
- It is a powerful business tool which can keep your business ahead of its competitors.

CRM is not:

- CRM is not a technology. Technology is simply an enabler, not the driver for CRM.
- It is not a software product you buy and simply install.
- It is not Sales Force Automation (SFA), which is mainly used to drive a sales force to increase a company's revenue.
- It is not Contact Management, which is mainly used to keep track of your existing customers and prospects.
- It is not a Helpdesk system, used to drive marketing campaigns and telesales.
- It is not a call/case management system used to drive field service engineers or customer service requests.
- It is not just one of these – it's all of these, and more!



Your Business. Your Customers. Our Technology.

Top 3 tips for successful CRM

1. Choose a partner to suit your business

- Choose a partner who is independent and can help you identify and evaluate a range of options, ideas and technology.
- Be careful of companies that make claims of being “The Biggest”, “The Best”, or “The Leading”. They are often software resellers driven by license sales and aligned with one software vendor.
- Every company is different, with different needs, in different areas. This requires a tailored approach, not a one-size-fits-all solution.

2. Make sure the technology fits your business (not the other way around)

- Be careful that the technology you select does not force your business to spend more time than it did entering and managing data.
- Be careful of technology that forces you to change your business processes. This is often a workaround for shortfalls or inadequacies in the software application.
- Be careful of purchasing technology that serves just one main purpose, sold under the banner of a CRM system.
- Your business may already have technology in place that serves its purpose well but just needs one CRM component. Select technology that does not force you to change what is already working for your business, but one that will slot in like a jigsaw puzzle and interact well with your existing technology.
- Beware of “Solution Selling” or claims to know your business better than you. This is typically a tactic used to sell older outdated software applications. Make sure the technology you’re evaluating is a good fit to your business requirements, and avoid pursuing solutions that do not address each and every one of your requirements.

3. Invest in technology that will help your business grow – and grow with you

- Your business might not warrant a full ‘feature rich’ software application just yet, but may in the future. Choose technologies that can easily change with your needs, simply by upgrading or purchasing add-ons or additional licenses, not an entirely new package.
- Be careful that the technology you select meets all your requirements and has the foundations to grow with your business. If you are not 100 per cent satisfied it will meet all your requirements then do not buy it until you have seen it working and been convinced it will meet your needs, now and in the future.

For more tips or guidance, please contact any one of our team and we’ll be happy to point you and your business in the right direction.



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