LEARNING MADE EASY

CRM

for dummies®

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Gain a complete picture of who your customers are

Connect all aspects of your business with a CRM solution

Automate workflows and processes through CRM

Lars Helgeson

CRM

by Lars Helgeson

for dummies®
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CRM For Dummies®

Published by: **John Wiley & Sons, Inc.,** 111 River Street, Hoboken, NJ 07030-5774, www.wiley.com

Published simultaneously in Canada

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Library of Congress Control Number: 2017942394

ISBN 978-1-119-36897-7 (pbk); ISBN 978-1-119-36898-4 (ebk); ISBN 978-1-119-36899-1 (ebk)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

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Introduction

If you ask ten people what CRM (Customer Relationship Management) is, you'll get ten different answers. Some think of it as a sales tool, some think of it as a culture. Some people see it as a savior for a business, offering accountability and efficiency. Some people are scared to death of CRM for the workload it can create if it isn't done right.

Very, very few people have ever taken a class in CRM. Universities are only now starting to offer it in their curricula. Seminars are often very product-focused. Without standardized definitions and training programs, it's a challenge to bring everyone in an organization up to the same level of proficiency with CRM.

I recently had a conversation with a friend who works in a company that forces all sales reps to manually enter every bit of data into the company's homegrown CRM. He tallied up the hours he spent in a month just doing data entry — 20 hours. It's no wonder some people don't like CRM!

In this book, I talk about the concept of Complete CRM as a way of helping you think of it as part of a bigger picture. A CRM that doesn't capture the information you need to do your job puts data in unreachable silos. A CRM that automatically pulls in sales, marketing, and operational information also pulls a team together. This is what I mean by *complete.*

CRM is not a simple subject. It involves many disciplines; to make it effective, you must have at least a basic knowledge of how those disciplines work. From managing sales people to building emails to running events, CRM reaches across every department in your organization. But like another friend once told me, "How do you climb a mountain? One step at a time."

About This Book

This book is written in plain, simple English. The point is to break down a complex topic (designing and implementing CRM) into manageable pieces. I first cover the basics of sales management, marketing, and operational process. From there, I show you how to apply CRM to each of those fields.

The content of this book has been pulled together from my experience helping hundreds of businesses launch and maintain their CRM initiatives, combined with the research and feedback of leaders in this space.

If you're a CRM expert, there's a good chance you will gain some lessons from the many sources and experiences cited in this book. If you're a business owner looking to get CRM working for you, this book provides you the foundation for managing a team or outsourcing your CRM implementation.

Remember that every business is unique, and the way a CRM is used within that business is also unique. There is no "one size fits all" for any business unless you are a franchisor (and even then, there are variables from franchisee to franchisee).

Icons Used in This Book

This book uses icons to call out special attention to gotchas or little pearls of wisdom you can take with you.

TIP

This icon alerts you about information you can apply to your business today. Usually most people overlook these things that can be a surprising benefit to you.

REMEMBER

Don't forget to remember these important points (or at least dog-ear the pages so that you can look them up again a few days later).

WARNING

When it comes to designing and getting your team using your CRM, you can make costly mistakes. These paragraphs tip you off to those gotchas that can set you back in time, money, or attitude.

Where to Go from Here

Now you're ready for action. Give the pages a quick flip and scan a section or two that you know you'll need later. Remember, this is *your* book — your toolbox of strategies and tactics that gets your team loving and using your CRM. Circle any paragraphs you find useful, highlight key concepts, add your own sticky notes, and doodle in the margins next to the complicated stuff.

This book starts with a background and focus on CRM strategy. When you have that figured out, Chapter 3 helps you find the best vendor. After that, I cover some basic topics about sales, marketing, and operations and how they fit into your CRM. And finally, the book ends with an advanced discussion on how to use the concepts of Complete CRM to bring your business to the next level.

Finally, don't forget to check out the cheat sheet for this book at `dummies.com` and search for this book's title.

REMEMBER

The more you mark up your book, the easier it is for you to find all the good stuff again.

1

Laying the CRM Foundation

IN THIS PART . . .

Understand the key strategies and components that make up your Complete CRM.

Get your team on board and create a data-driven culture.

Pick the best sales and marketing software for your business

IN THIS CHAPTER

» Finding out how to incorporate the R in CRM

» Integrating CRM into your business

» Understanding the terms around CRM

» Determining your CRM goals

Chapter 1
Embarking on Your Journey to Complete CRM

The first part of getting Customer Relationship Management (CRM) to work for your business is to understand what CRM really is. If you ask ten people, you're likely to get ten different answers, each rooted in their personal experiences.

CRM has only started being taught in colleges and universities, so it's no wonder there is fear, uncertainty, and doubt (also known as FUD) around it. Making CRM work in any business is a challenge, but it's one you can overcome with a grasp of the strategies and tactics.

This chapter introduces the concept of Complete CRM and all the terms and technologies that make it possible. You can then apply all that knowledge to your organization with confidence.

Bringing the R in CRM to the Forefront

Every organization is built on relationships. It doesn't matter how big or small the company is, which industry it serves, or who you are in that organization — relationships drive the success or failure of that group of people and the technology behind them.

The "R" in CRM stands for "relationship," something that everyone — whether in sales, marketing, or operations — in your company contributes to. The more you understand how these relationships work, and how everyone in your organization influences them, the more efficiently your organization runs and the easier you generate revenue.

One key to understanding relationships in the context of CRM is knowing the difference between Complete CRM and Traditional CRM.

Traditional CRM is rooted in cataloging notes that salespeople made when they called their leads. Leads became contacts only after they bought something. These methods quickly became cumbersome and outdated when compared with the modern online, customizable, and mobile solutions available today.

Complete CRM is built for today's business world and requires:

- A holistic view of the relationship between your business and its leads, clients, vendors, and employees
- A comprehensive approach to CRM
- A combination of strategy, practice, and software that brings together everything you know about a lead or client into a single resource

Complete CRM helps you understand what happens in the sales process, record how people engage with your marketing efforts, and track other interactions with your operations staff (for example, customer service, events, projects, and invoicing). Figure 1-1 illustrates how everything works together in a single system.

FIGURE 1-1: What Complete CRM does for you.

HIRING A CRM CONSULTANT

Many businesses work with consultants to set up Complete CRM. Not all consultants are created equal — in fact, a lot of consultants call themselves experts without the experience to back up the claim — and when it comes to CRM, most have specific biases based on their experiences installing or using a particular platform.

If you're hiring a consultant, be sure your consultant has experience relative to the size of your business and industry. If a consultant specializes in enterprise business process, don't expect that person to have an understanding of what it takes to run a startup business.

Don't rely on a single story or a gut feeling. CRM is too far-reaching, and the organization you work for is too important, to gamble with. With the right tools, reference material, and data, you'll make an informed decision that you can feel confident about.

Be cognizant of these gotchas that surface often when working with CRM:

- Some consultants will tell you that you must do something in an effort to bring them more work. If someone says "you have to hire this software development company" or "you have to use this system integrator to make your software work," you may be investing in something overly complicated that guarantees more work (and money) for overpriced labor.
- Some vendors will tell you their product (hardware or software) isn't working because you and your staff are misusing it. The vendor may blame the original salesperson. Remember that you're never stuck with a vendor you don't like; sometimes it's better to change strategies and vendors. Even if you've already invested a significant amount of money with a vendor, you're not trapped; you can make a switch to a new and better vendor.
- Many consultants are incentivized to sell businesses on large, complex systems because they're paid to get those systems up and running. Overbuilt CRM platforms can cause huge inefficiencies that may require you to spend thousands of hours and dollars to try to fix them. Be skeptical of falling for the big company line. Remember that bigger is not always better.

It takes an understanding of every piece of your organization to make Complete CRM work. Some concepts may be totally new to you. How some areas work may be totally new to you, and you may have to learn how different departments you've never ventured into work. You need to convince everyone from the top down of your vision of Complete CRM to be successful.

REMEMBER

Transitioning to a Complete CRM mindset can give you a greater perception and empathy for those people who make your organization the best it can be.

Extending CRM to Your Entire Business

CRM is more than just software. It's a mindset. Every business reaches a point, usually early on, when everything that's happening can't be held in someone's brain. People in the organization need to take notes, or they'll forget important things like customer issues, birthdays, or deadlines. With the aid of good tools to organize the information you need, you create a more efficient and effective business.

A good CRM system builds a framework for the information managed in your organization. Sales, marketing, and operations information needs to live in the same system because relationships reach across all those departments, as shown in Figure 1-2. Relationships represent the lifeblood of any organization, even those that don't outright sell products or services. The better you can understand and learn from those relationships, the more valuable and efficient you and your organization are.

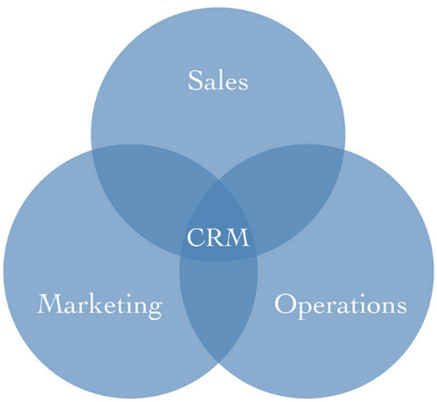

FIGURE 1-2: Sales, marketing, and operations working together.

Disorganization in any business leads to missed deadlines, sloppy work, and uninformed managers. CRM is the cure for these negative effects by creating organization and defining processes, but it doesn't just happen. It takes leadership, focus, and dedication to achieve the vision that you set.

Knowing the Buzzwords

CRM is awash in terms and buzzwords that people like to throw around. This section gives you the background you need to translate the CRM-speak.

You may be already familiar with some of these terms — for example, buyer personas are a tried-and-true marketing technique. But they may have a slightly different meaning in a CRM context than you're used to. Get to know these buzzwords, as they come up in meetings when you communicate your vision.

Content marketing

Content marketing is marketing, except instead of telling people to buy your widget, you're educating them on how great widgets like the ones that you sell are (oh, and by the way, this educational piece was sponsored by ACME Widget Company). It's a subtle way of getting people to read the pieces your marketing people write.

People "consume" content that they find interesting or educational. When you write a paper, record a podcast, or record a video, it's more likely to have an impact if you focus on providing value.

Your Complete CRM is connected to your content marketing pieces; Figure 1-3 shows a blog. Every blog, article, e-book, and whitepaper you write should capture the reader's contact information so you can follow up with relevant, personalized, and targeted messages. Capture all this information within your CRM, and your sales and marketing teams work together to the benefit of both.

Personalized content

Personalized content means that you create content specific to the person reading it. In the old days, this technique was referred to as a *mail merge,* where you would print "Dear Joe" at the top of a letter written to Joe. Nowadays, you can do that with email and webpages. You can even put totally customized pages (known as *personalized URLs,* or PURLs) together based on what you know about the reader. More targeted personalization in your marketing has a direct, positive impact on converting your leads into paying customers.

People listen when they feel someone is speaking directly to them. When you personalize content, you make people feel as though you care enough to make something just for them; see Figure 1-4. It's like hearing a story that was made just for you; you listen when you feel someone is speaking directly to you.

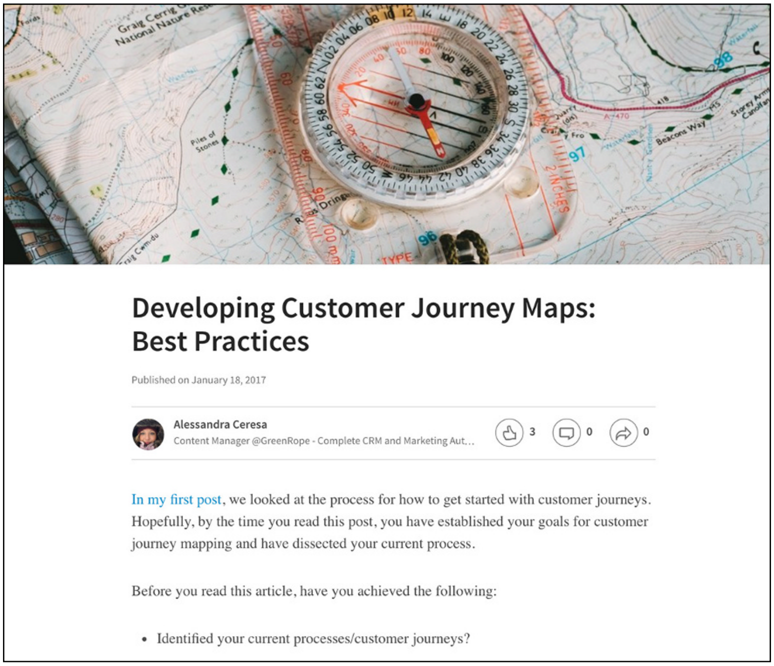

FIGURE 1-3: A blog is a good example of content marketing.

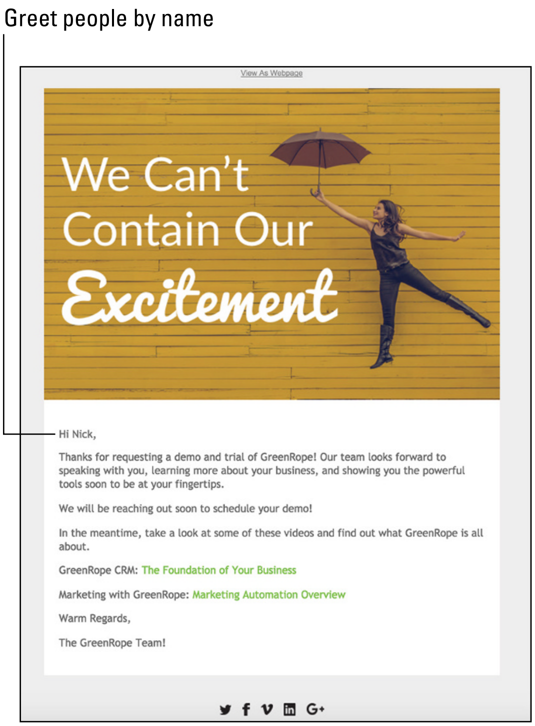

FIGURE 1-4: Personalized emails are better received.