

Buyers Guide

Introduction

The term CRM (Customer Relationship Management) has long been used in the enterprise world, but is becoming an everyday term in the evolving SMB sector. CRM is comprised of four main parts: Contacts, Process, Strategy, and Technology. These four aspects of CRM help a business understand, connect, better serve and nurture both leads and current customers.



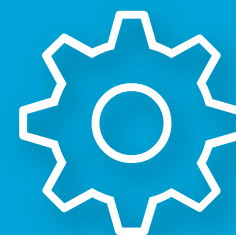
Contacts



Process



Strategy



Technology

Introduction



Before the advent of the CRM, Excel spreadsheets, notepads, and hard copy files played a large part in organizing and keeping track of clients and potential customers.

Today, new technologies allow us to get closer to our customers and engage with them in ways that were previously unavailable. CRM platforms effectively organize contact data and promote collaboration between both the sales and marketing teams within a company.

CRM is not just a book of contacts; it is a way for businesses to gain insight into the behavioral activities of their leads and customers. CRM data is critical in developing successful sales strategies and gaging the effectiveness of existing marketing efforts!

To strengthen both the relationship between customer and business AND sales and marketing departments, integration is key. Many of the CRM platforms out there do not include

features such as predictive analytics, auto-responders, advanced marketing automation tools, web stores, web traffic, forms and surveys. A platform that integrates becomes a fully functioning business operating system allowing your business to become more efficient and therefore close more deals.

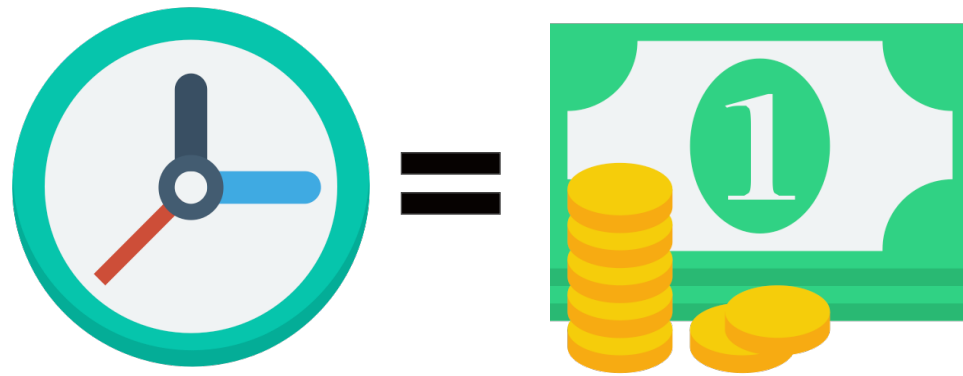
A business operating system that allows a business to streamline daily sales and marketing operations saves time, money and increases efficiency.

Integration: The Key to Successful Sales and Marketing

A successful company recognizes the customer as the focal point of their business. A customer-centric organization has the ability to better understand and more effectively meet its customer needs.



Integration



With so many software technologies addressing different marketing needs, customers are spending time and money integrating multiple third party software. Investing in an already integrated system makes most sense for businesses looking to save money, time, and relevant data.

Key components of an integrated platform:

- CRM
- Drip Campaigns
- Email Marketing
- Social Media
- Surveys
- Web Stores
- Real-time Tracking & Analytics

- Invoicing
- Signup Forms & Auto-responders
- Calendaring
- Event Management
- Customization
- Project & Task Management
- SMS Marketing
- Ticketing

Why invest in integrated software?

Integration in the marketing process is the best way to create efficiency and effectiveness in a company's sales funnel.

Having one central location/product or software allows the organization to rely on a single consistent source of data that can be accessed internally throughout the corporation. Using various systems can result in duplicated data, conflict, and poor quality information, not to mention a costly investment. By integrating CRM with other operations such as email marketing, automation (drip campaigns, auto-responders, etc), surveys, forms, web stores, social, and project management, a company can utilize all data to create effective strategies that target their audience.

All businesses require a flexible and adaptable system that supports and increases their productivity while reducing both

technological and business risks. Challenges, such as inconsistent data and miscommunication, arise when information is not readily available to everyone within the company. Hosting data in one place will not only increase sales but also support an operation's overall productivity and profitability, resulting in overall growth and success.

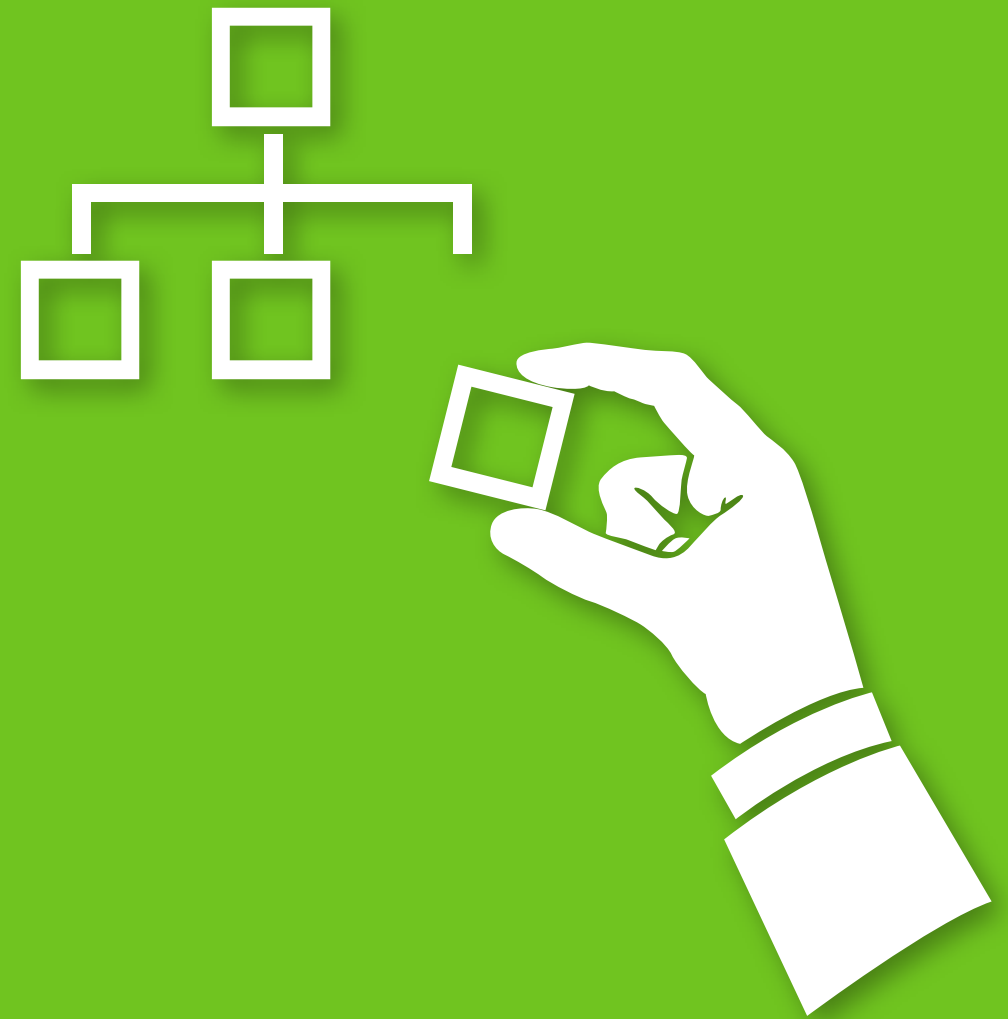
As a start up or SME, overhead costs need to be at a minimum to allow for maximum profitability. It is no surprise that we are seeing a shift towards more integrated software marketing systems. At the very least, having an integrated CRM and email marketing software will allow both the marketing and sales personnel to gain great insight into your customers, enabling the marketer to better target all of their outbound and inbound marketing efforts.

Having analytics attached to your CRM, as well as email marketing, surveys, auto-responders, drip campaigns, web stores, and real time tracking will also enhance your marketing. Being able to identify what content is attracting consumers, and seeing WHO is spending time there is crucial in developing an effective, efficient and directed online marketing strategy.

As the small to mid-sized business pool continues to grow, software companies conforming to the basic needs of a SMB Integration is the next wave.

Marketing Automation: What and Why

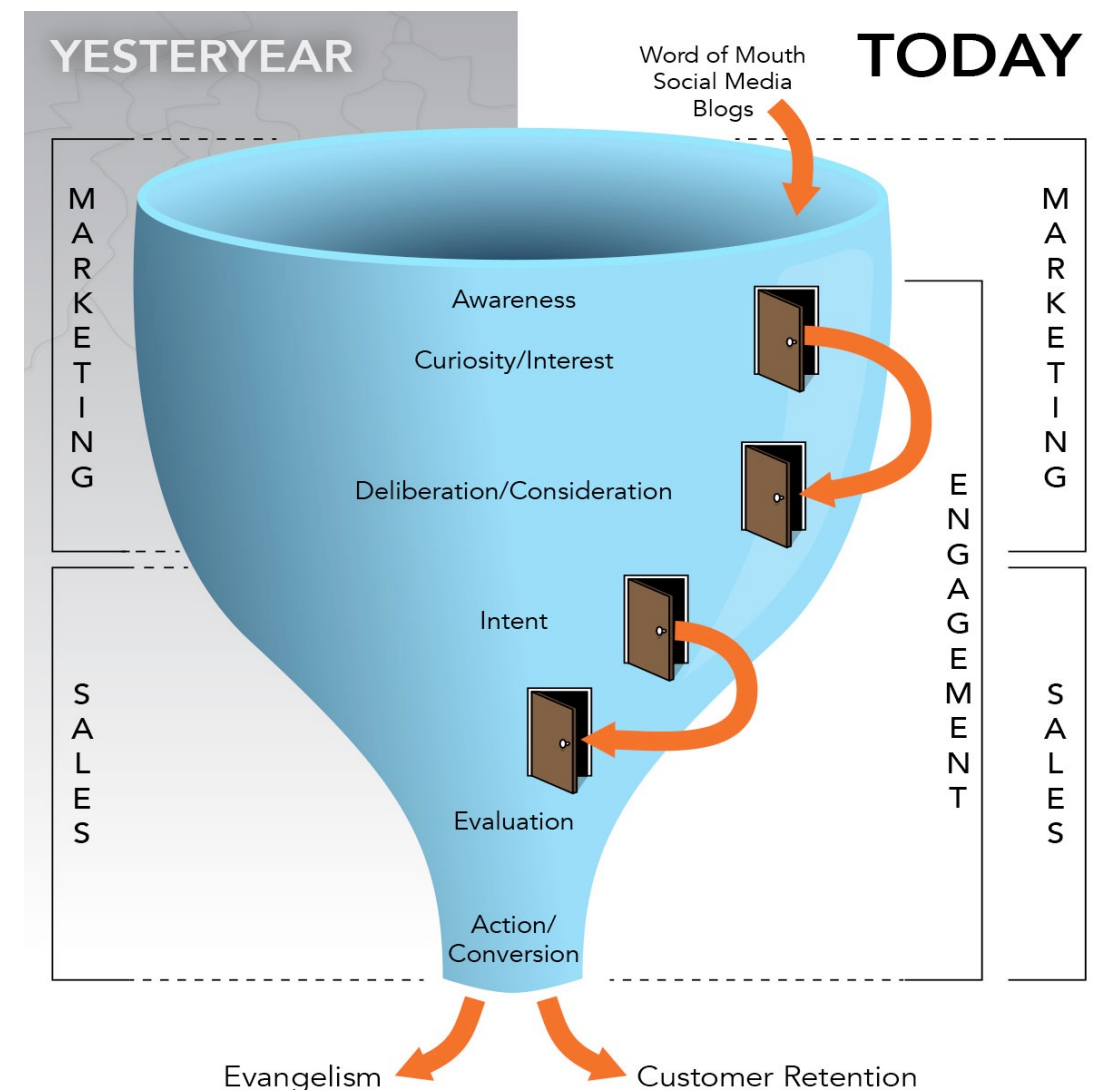
Just as Bill Gates once said, “The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency.” Simply put, correctly implemented marketing automation promotes efficiency and consistency in any sized business.



- Email Marketing
- Lead Generation
- Lead Scoring (See blog at www.greenrope.com/blog)
- CRM Integration
- Landing Pages
- Signup Forms
- Analytics
- Workflows

Every buyer is at a different stage, and marketing automation allows both the marketer and the sales executives to gauge where a lead is in the sales process. **This way, the customer purchases on his own time, and the sales executives knows where to jump in if necessary,**

Having a CRM that tracks this movement, and having automation that triggers messages based on these actions is critical if you want to successfully move leads down your sales funnel.



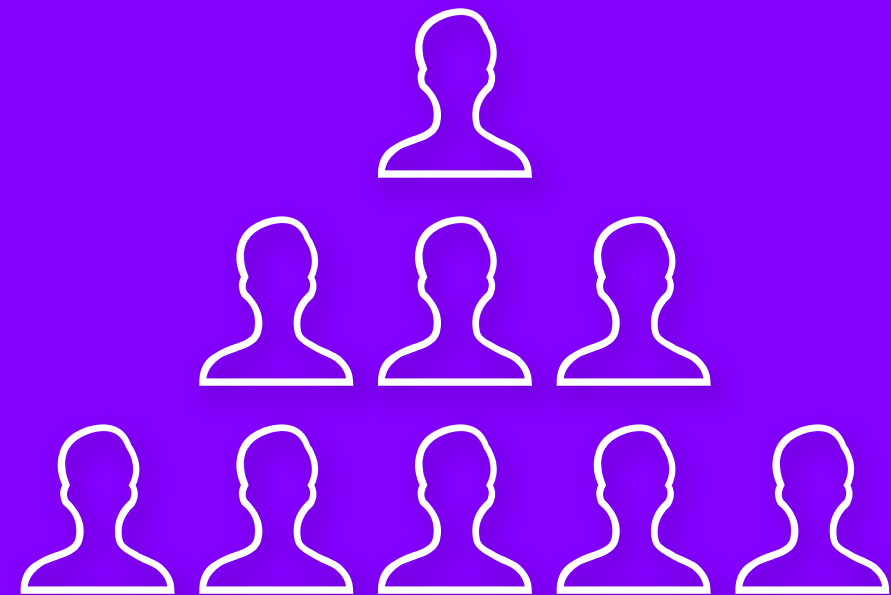
Automation connects both sales and marketing by integrating the process of lead generation, nurturing, and the conversion of leads into customers. Even though automation is an efficient way to capture and manage leads, it requires creativity, thought, and strategy.

The success of any campaign depends on many factors such as content, timing, and delivery just to name a few. When developing a campaign, you must think of it as a journey you're guiding your leads through.

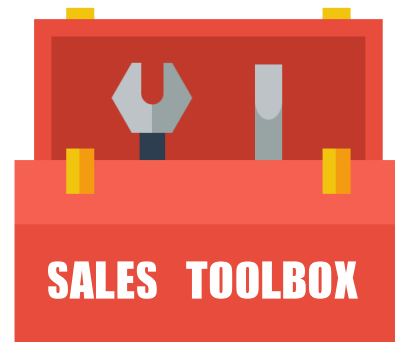
[Download The Essential B2B Lead Nurturing Handbook.](#)

CRM: The Sales Tool You Can't Ignore

CRM software benefits both large corporate entities as well as small to mid-size businesses. From 1 to 1,000,000 contacts, a CRM can help any business implement a successful sales strategy providing the user with extensive data integrated into one central database.



Benefits of CRM



CRMs house contacts from all over the world, keeping both your local and International contacts organized. There are two types of CRM platforms, the core CRM and the integrated CRM. Both are useful depending on the needs of your business.

The many benefits of CRM include:

- Automation of routine tasks and simplified marketing campaigns, all with integrated tracking
- Account and contact information made available to everyone within the system, with multiple log-ins or shared access
- **Overall revenue increase**, due to higher levels of efficiency and organization combined with the reduced cost of other systems
- **Increased level of customer service**, due to a constant interaction with the customer

- Organizations gain the **competitive edge** by understanding the wants, needs and activities of their customers
- Constant supply of customer data all in one organized location = **CRM**
- Routine tasks are easier to manage. Choose a CRM with a project management tool to execute, track and monitor projects easier than ever before
- **Marketing and support expenses are reduced** by email marketing and tracking data through the CRM
- Sales teams can be effectively managed by tracking all engagement and activities with leads and customers
- All departments are involved resulting in **teamwork and collaboration** within the organization and the integrated CRM becomes your internal business operating system
- **Communication channels are improved** with social media, email marketing and much more
- Customers have detailed profiles enabling you to target by demographic
- **New selling opportunities revealed**
- Increased awareness of the customer's needs or activities and are able to respond quicker
- Easy access to purchase histories if a web store exists

A Closer Look at the Benefits of CRM

More than just contact data: **CRM's provide a historical analysis of all your customers and leads. This collection of data helps reduce the research needed to gauge customer's needs, ultimately improving your understanding of your customers and increasing business revenue.**



A Closer Look at the Benefits of CRM



A CRM collects data from different customer touch points such as email marketing, surveys, website visits, and more, which can then be manipulated for marketing efforts. **Data analysis is the important piece of the puzzle, not just the data itself.** An integrated CRM system that ties all of the data pieces together is the best option for a small or mid-sized organization looking to build more personalized relationships and provide the best customer experience.

A better way to nurture leads: Nurturing leads is critical in order to move contacts through the sales funnel and transform them into sales ready opportunities. CRM software is a great way to trigger workflows, track activities, and ensure that the sales executive is on top of every opportunity and lead.

The CRM records any interaction with a contact such as emails or phone calls, and can trigger workflows and essential

follow up activities to the appropriate shared access user. You also have the ability to assign tasks to other team members for follow-up.

Increased collaboration between sales and marketing: Because a CRM houses customer behavior and engagement, it is a great place for a marketing team to gather ideas of what marketing efforts are working and which ones are not. **It allows both marketing and sales executives to work together to acquire and nurture leads, as well as keep in touch with existing customers.**

Marketing executives can develop strategies based on the information that the CRM collects; ; for instance, the web pages they visit, social activities, webinars attended, links clicked, etc . This information not only helps the sales executives gauge the customers' wants and needs, but also enables the marketers to connect with these customers and determine what strategies are effective in targeting both current and future clients.

Providing a competitive customer experience: With more choices than ever before, the kind of experience your customer a customer has with your brand is crucial to your success. In order to beat your competitors and win over the consumers, it is important to provide top-notch customer service. **The customer experience has six different areas: understanding the customer, strategy, design, culture, governance and measurement.**

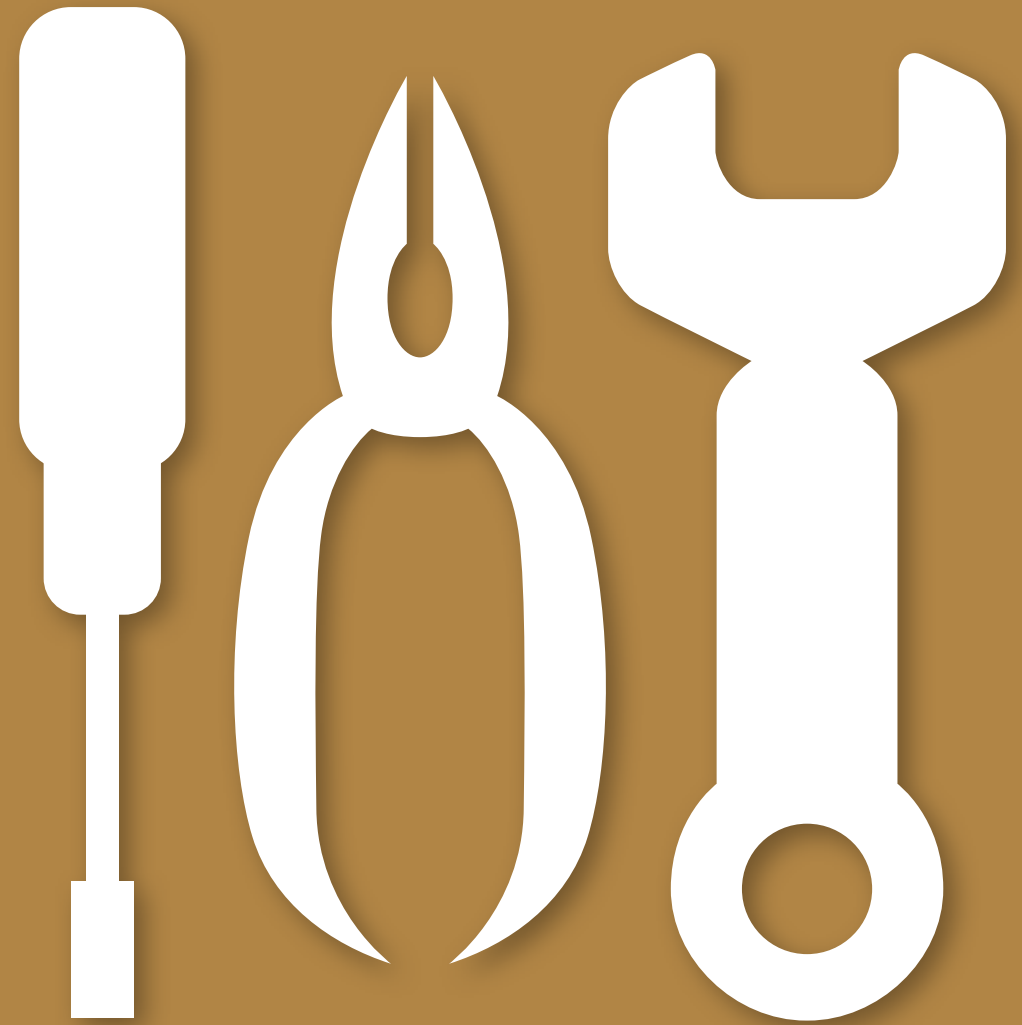
Every stage of a customer's experience must exceed expectations if you plan to retain them in the future. This means, it must include all aspects online, offline, mobile, etc. With so many avenues for a customer to come by, it is important that each one exude the same message of "this is why you should choose us." Using tactics like support ticketing systems, webinars, or loyalty programs go a long way in the customer's eyes, and makes it easier for all departments within the company to gauge how they are performing.

Successful CRM Implementation:

The biggest problem that we notice today is that most of the time people are not really using their CRM to its fullest potential, leaving a lot of room for misuse and misunderstanding.

Implementing a process, such as CRM, might seem strenuous at first, but a CRM reaps many rewards if used properly.

Let's explore some of the best practices for implementing a successful CRM process.



Implementing CRM

1. **Select the right software for your business.**

(Hopefully this guide helps) Are you looking for a traditional CRM or a more integrated platform that ties sales and marketing efforts together? Every company/industry uses a CRM differently, so it is necessary that the CRM software you choose be the right one for your business' goals. A great example is an integrated business operating system like GreenRope, an all encompassing CRM, including features such as social media, event management, project management, website building, and tracking, just to name a few. All of these features and capabilities are housed under one roof, all synced with your CRM. A platform like this ensures the fluid sharing of information between all departments in a company, without having to reference multiple locations.

2. **Set realistic goals and take it one step at a time.**

Expecting everyone to jump on board right away with the CRM is unrealistic. Successful implementation takes planning and time. An organization should consider phasing in the software, rather than simply giving access

and letting the users run with it. Each department and individual using the CRM should receive the same training and information to ensure successful implementation. Using a CRM to its fullest potential can seem overwhelming when all the bells and whistles are presented at once, but when presented in stages it provides for a more positive CRM experience. According to one of our surveys, it takes users an average of 1-3 months to get their CRM fully up and running.

3. **Make it company culture.** Every member of the team must be on board with the CRM, especially senior management. Senior executives must lead by example and share the benefits of using the CRM with their employees. When people are seeing the fruits of their labor, they are more likely to continue on this path to success. In order to adopt the CRM culture fully, each company member needs to know the strategy is working.

4. **Clean up your data.** Organized data is key for successful implementation. Make sure that duplicate contacts do not exist, and that the customer's information is consistent throughout. Accurate and consistent data needs to be available across all departments to really reap the benefits of a properly executed CRM strategy. In order to provide the ultimate level of customer service and execute effective marketing strategies, it is crucial that everyone have easy access to accurate and consistent information.

CRM implementation is not always easy, but if planned properly, can sail your company right into the path of success. The difference between a successful and ineffective CRM implementation is the time and commitment the company puts forth to make sure everyone on board easily adopts the entire process.

Add Other Resources:

[How to Plan for Successful CRM Implementation](#)

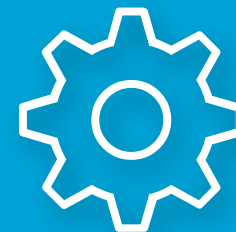
[The Importance of CRM Implementation Strategy](#)

Be an Informed Buyer

With so many choices in the CRM and Marketing Automation industry, it is important to stay informed about current trends and available products so you can evaluate which is best for your business. It is crucial to recognize cost, features offered, as well as the company's customer service options. Because software requires successful implementation, an easily accessible support team is the greatest asset to any business. Because you want to grow with your CRM software, selecting a software company that you can trust and build a relationship with should be a high priority.



Cost



Features



Service

Before Making a Decision



Before making a decision on whether to buy or not, make sure you understand what you are paying for to avoid any unpleasant surprises, such as unrecognizable charges.

A few things to keep in mind:

Unlimited users vs. charge per user: Some platforms charge per user vs per module; depending on your company, you may want to do a price comparison for your utilization in the long run. Per user applications can get quite pricey. Integrated systems offering a multi-user platform are cost-effective and efficient.

Help/Knowledge Base resources: Do they provide start up help, webinars, eBooks, case studies, and a consistent flow of content that is informative and valuable? These resources highlight the company's commitment to the customer and your growth.

Free Trial/Assisted Demo: The ability to demo and try out any platform you are researching is an important piece of the puzzle. Demoing a platform allows you to get a good idea of how the platform works and how it can fit into your business. First start with a guided demo, and then setup a trial account to see how user-friendly and customizable the system is.

Adaptability: Your business has unique processes, and the CRM you select should be easily customizable to fit your business needs. Make sure that you can create the same workflows, user-defined fields, list segments, opportunities, etc that you currently have working in your business. You will also want to make sure that the system is scalable and can grow with you.

Before choosing the right CRM for you, ensure that all of your needs are met and that the software provides your business with the features and customization it requires to implement a successful CRM strategy.