

# 15 things your CRM system

## could be telling you about your customer (but probably isn't)

**C**RM software. It's about as crucial as it gets when it comes to managing your sales activities.

But while it may be crucial, it's hardly what you'd describe as sexy, and therefore there's the temptation to look at CRM as something of a 'set-and-forget' piece of tech.

But how much are you missing out on? Considering CRM's software's flexibility and potential, could it be that most of us are only skimming the surface of what's actually possible with today's CRMware? Could it be that there's a huge font of information - about your customer, your staff, and your business - that you're failing to put to use?

iStart cornered seven industry insiders to find out just what today's CRM software is capable of.

### 1. Hipbone connection

#### *Find out who knows who*

It's not what you know, they say, it's who you know; and the right CRM software can show you just what direct and indirect relationships you have. Using social networks such as LinkedIn and Twitter to build up a back-story about your clients can give you the edge when making contact.

"You can integrate your CRM with LinkedIn and use that integration to get you an 'in' with your clients," says Steven Foster, CRM product manager InterGen. "You can get a lot of insight about an organisation just by looking at social media sites like LinkedIn so when you embed that inside your CRM tool you are giving your sales people more data to work with and to drive opportunities by starting conversations up."

"The system will show a LinkedIn profile within a contact and show how you may be connected to that individual via other people. You can start using LinkedIn and using a standard Microsoft CRM connection to start building up that web of 'who

knows who'. You can then use that information intelligently."

### 2. Finger on the pulse

#### *Automatic news searches by any parameter*

In a similar fashion to using social media as a way of building up a 'back-story' around a client, you can utilise online news services to achieve a similar result. Microsoft Dynamics, for example, offers an add-on solution called 'InsideView', that allows you to link information from Google news, Bing News, Twitter or other common business websites, and build it right into a your CRM desktop.

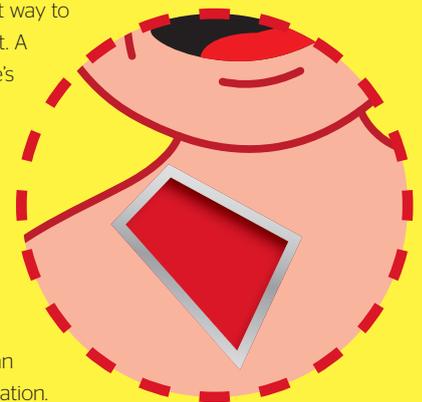
When customer information is bought up in the CRM solution, any mentions of clients on the web are automatically sourced, and presented to the viewer, offering a great way to grease the wheels when talking to a business contact. A single click of a button will generate the news service's URL with the search term already loaded.

### 3. Hot under the collar

#### *HeatMapping customer value, via demographics*

It's true: knowledge is power and the more you know about your clients' situation the better positioned you are to make that all important pitch.

Some CRM software can be customised to create highly specific heatmaps - visual representations of an environment, overlaid with certain statistical information. If, for example, your client is a reseller of toys, you can dial your client's store in your CRM solution, then overlay third-party supplied demographics, say, average customer salary and age in the area, onto that map, allowing you to gain greater insight into what opportunities are available to your client, and, in turn, to you, as you tailor your approach to the client based on the specifics of the environment.



## 4. Eyes (in the back of head)

### *Monitoring via activity patterns*

If there's one thing CRM software is good at, it's seeing patterns. Put that power to good use by analysing sales patterns for suspicious activity. A salesperson may have a KPI of making a certain amount of calls per week. However, if a salesperson is contacting a certain person several times a week, without opportunities being created, your CRM solution can be customised to flag that activity as potential time wasting or at least worth enquiry. Likewise, if that salesperson fails to make contact with a prospect for a certain amount of time, that can automatically trigger an alert that activity needs to be increased.

The same principle can be used for customers.

"Any time a pattern based on past activity can be identified, that information can be used as a predictor of future behaviour," says Foster. "If, for example, there is a sudden drop-off in customer interactions - such as appointments, helpdesk contact, or the length of phone calls - that can be a sign that a customer is looking elsewhere. It's all a case of using the data."

## 5. Wishbone

### *Profiling an organisation against its peers to identify opportunities*

The ability to compare similar clients' activity gives sales rep a lot of leverage, especially when they're dealing with customers face-to-face.

"A lot of people using CRM's these days are sales reps, who you're distributing a range of products to," says Philip Dodds of Phocas.

"You might be selling to Repco outlets and you can see that they're not selling a certain product well in a Wellington branch for instance, but they're selling plenty of them in the Auckland branch. Maybe it's as simple as it being stocked in the wrong part of the shelf for example. That's what you want to know when you walk into the store. You don't just want your CRM to tell you the address of the business; you want it to tell you what to say when you get in there. And what you want to say is 'Why aren't you selling this product like they are in Auckland? I think it's because you've got it down the back of the shop when it should be brought up front.'"

## 5. Kneejerk reaction

### *Customer attrition alerts*

"If there's been no contact with a particular client over a particular period of time," says Cameron Hallmark, chief product officer, Greentree, "your CRM's approvals and alerts system can automatically alert that contact in a highly personalised way."

"When the system detects that there's been no contact for a month for example, it will send the client an email, but it will look like it's actually come from the sales guy within the organisation, not like the system sent it. For example, it would say 'Dear Frank, haven't heard from you for such-and-such a time, just catching up; just drop us a line,

etcetera."

The system then sends an automated email with a message of your choosing and you receive an alert so you know it's been sent. In addition, contacts can be graded at different levels, provoking different behaviour from the system.

"So anyone who is graded at a high level would get an email like that if activity suddenly stopped. For someone graded intermediate, that email would go out after three months or six months. The salesman doesn't have to trawl through the database themselves, because the database will say 'hey; this hasn't happened for a while; we have to love these people a little more'".

## 6. Rule of thumb

Using rule-based thinking to maintain margins

Depending on the degree of user-customisation available, some CRM systems offer highly configurable rule-based functionality. Telling your CRM software: 'If this is true, do that', can open up a whole range of options for automating activity.

"You can set your CRM to flag margins that are too low," says Hallmark.

"This means, on quotes and on orders, setting a trigger that, if the margin is too low, the quote can't be sent out by email or printed, until it's gone through an approval process internally."

"So if a salesman says 'Oh yeah, I can give you that price' to a client, and he goes and puts the quote in and the margin is too low, the system will go 'I'm going to let you put the quote in, but there's no way this is getting out of the system until this is approved from higher up'".

## 9. More thumbs

### *The exception proves the rule*

And it gets cleverer. In addition to an approval system for low margins, the process can be further customised to only trigger an alert if overall profits fall below par, allowing temporary margin losses through, if it's in the interest of a lucrative sale overall.

"We've got a client in Brunswick," continues Hallmark, "who says 'I don't care if the sales team makes a loss on one of the lines. As long as the overall quote makes 20 per cent, it can go out the door'".

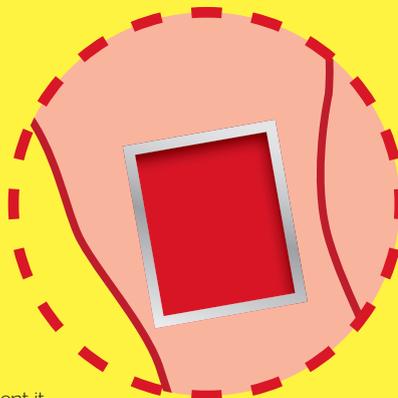
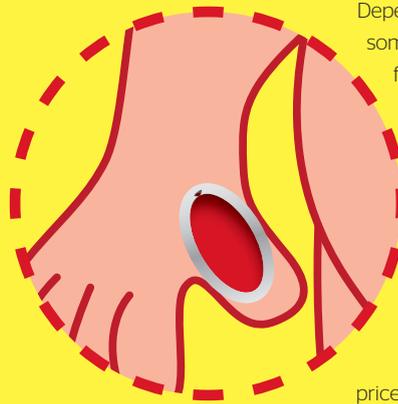
The benefit of a nuanced system for margin alerts provides the best of both worlds for management and sales staff. It allows managers to maintain control over the kind of deals being done, but it also allows sales staff the maximum amount of flexibility when it comes to striking deals with clients.

"It's a good system because sales guys understand their own market," says Hallmark. "They understand what they can and what they can't get away with, and what triggers different people. A system like this allows them to do that."

## 10. Strong grip (on reality)

### *Overview of all connected desktops*

Worried that you don't know what your staff is getting up to?



Your CRM solution might have the answer.

Some CRM systems enable sales managers to monitor sales staff's customised desktops, allowing a top-down view of who's doing what, when, in real time.

"If you're in charge of ten sales staff," says Greentree's Hallmark, "you can go 'okay, show me Bill's desk', and it will come up and say 'Bill's working on three quotes; this is how long they've been going for, this when they're expected to be won and he's made this many calls in the last few weeks.'"

"Sure, it's a bit Big Brother, but many see this sort of information as essential."

The added benefit is of course that the information is also centralised, meaning that if 'Bill' is away from his desk and the client calls about the quote, anyone can process the order in his absence.

## 11. Sense of direction

### *Integrate with GoogleMaps*

Sometimes the simplest functionality is the best.

If you're new to a city or have to make a trip to an unfamiliar part of town, your CRM system can be customised to link to GoogleMaps. When a client's details are accessed a link to the address on GoogleMaps is presented. Click the link and the full functionality of GoogleMaps is available at the touch of a button.

And, of course, if you're accessing your CRM software using a mobile device, all the better.

## 12. Customer's belly-ache

### *Complaint management (or, 'opportunity to improve')*

Complaint management can be a tricky part of any business. With a customer already aggrieved, it's in a company's best interests to ensure that each event is handled appropriately, and that can be made easier with CRM.

The first step, says Peter Molyneux, general manager of Crossware, is to build a workflow around the complaint that takes the process from first contact to resolution.

"I really like the term 'opportunity to improve'," says Molyneux, "because that's really how you should be using it. When you are able to report on where you're getting problems, you can see what you have to do to stop having those problems. You can be proactive about stopping complaints."

Users can customise software according to different types of complaints, creating specific workflows around different kinds of issues, that instruct users step-by-step on best policy for dealing with the event, from first contact all the way through to resolution.

## 13. Attention span

### *Rate your clients*

CRM software gives you a great opportunity to overcome the 80/20 rule - the idea that 80 per cent of your sales come from 20 per cent of your clients - in a logical and methodical way.

"A lot of businesses can find themselves spending too much time on clients that aren't necessarily going to help them achieve specific internal goals," says Molyneux. "And similarly, some customers have specific needs that you have to make sure you're attending to."

So just how much attention should you give to a particular client?

"You can decide depending on the information that you've captured. Using certain measurements, such as 'what is the size of the organisation? What is the amount of revenue that the customer generates?', you can assign a client a rating to help you decide how much attention they should be receiving from you. You can then use your CRM to monitor and track these things, which the sales team can then use to drive their efforts in the most appropriate way."

## 14. Blind Spot

### *Find out what you're not selling*

What it comes to making the most of opportunities, an awareness of what you're not selling, along with what you are, is invaluable.

Enlist your CRM system to point out logical opportunities that may have been missed.

"It's one thing for the CRM system to tell you what you've done," says Philip Dodds of Phocas, "it's another thing to be able to analyse the data so you can see what you need to improve your relationship with that customer".

"It's about spotting opportunities. A classic example would be a company that sells tables and chairs. If there's a customer who's buying tables, but not chairs, a good CRM solution will tell you that there's an opportunity there. CRM software can tell you how you're not serving the customer, adding gravitas to the meeting, rather than appointments being simply a date-based endeavour".

## 15. Use it or lose it

### *The key is making it count*

The biggest obstacle to getting the most out of a CRM system, says Peter Fletcher, TEIQ, is that it's all too easy for the technology to sit on the shelf instead of being put to good use.

"Most people simply aren't using it," says Fletcher, "and there are not a lot of people out there using CRM effectively. They are using it as a souped-up Outlook contact manager, and they're not doing the sort of analysis that they could be."

"The thing about CRM that holds organisations back is issues around user adoption, which is a pity, because it's really so simple that people should be able to spread it throughout an organisation even without any training." **f**



### **WITH SPECIAL THANKS TO//**

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