

CRM explained

How implementing a CRM system can benefit your business



Customer relationship management (CRM) is a system for managing a business's current and future customers. CRM typically involves using a form of technology that helps to organize customer data and streamline the coordination of customer communications with sales, marketing, technical support, and customer service personnel. The goal of a CRM system is to put customers at the heart of a business's operations.

What does CRM do?

The first step with CRM is getting your customer data in one centralized place so everyone is using the same information. Leads from any marketing efforts are easily passed onto sales for follow-up. Next, a salesperson takes the lead, follows up, and tracks it through the buying cycle, ensuring that every interaction needed to win that prospect is handled just right. Those in management in the meantime can monitor everyone's progress, stepping in where needed. Anyone from any department can be brought into a customer activity, whether it's to help win a new customer, fulfill new services or products, support a customer's inquiries, or to handle a customer issue.

The biggest benefit that most businesses will find when using a CRM system comes from having all data organized in one, easy-to-access portal rather than spread out among multiple departments and people. This allows a business to empower its employees to make intelligible decisions based on accurate information with increased collaboration throughout the business.

Implementing a CRM system into your business can help you:

- Automate your sales efforts so that no opportunity gets missed. Get easy visibility into all current and historical account details, activities, and opportunities so you know where to focus your best sales efforts.
- Track the success of your marketing campaigns and sales efforts. Eliminate guesswork and maximize your marketing investments for better results.
- Provide exceptional customer service by having the flow of communications, activities, and escalations well defined, while using current and accurate customer information.
- Gain better insights into business performance to drive growth and increase productivity and profitability.

Why choose CRM?

Implementing a CRM system is essential for any business managing multiple customer touchpoints over a variety of different departments. By successfully implementing a CRM system, businesses can better ensure that their customer data will be reliable, current, and easy for any department to access anywhere, at any time. Effective CRM system utilization will help to ensure that each interaction adds value to the relationship. Ultimately, CRM puts customers at the heart of a business's operations and helps to enable extraordinary customer experiences that boost top- and bottom-line financial performance.

For more info, visit: [Sage.com](https://www.sage.com)
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Examples of CRM features

Sales

- Sales forecasting
- Pipeline management
- Quotes and orders
- Price lists
- Lead to opportunity
- Team management

Customer Service

- Call handling
- Case management
- Knowledge base
- Self-service

Marketing

- Campaign management
- Customer profiling
- Mass email management
- Lead capture

Cross-departments

- Centralized contacts
- Calendar integration
- Social media integration
- Document management
- Email integration
- Dashboard
- Performance reports
- Mobile access