

Make the sale

Developing a customer relationship management program that gets results **Interviewed by Clare DeCapua**

More than ever, businesses are looking for ways to streamline processes, add value to marketing initiatives and ensure the customer is always king. A customer relationship management (CRM) program is a tool designed to create the efficiencies and process improvements that companies need to get through tough times as unscathed as possible. It provides a way to not only track sales and marketing information but also to track progress.

“The research that’s coming out right now shows that, while 2009 is a low capital expenditure year, a CRM program is near the top of most companies’ budgets as something they’re going to put in place if they haven’t already,” says Chris Spears, director of business development at Arke Systems. “Even in a down economy, this year CRM has been Microsoft’s fastest-growing software package.”

Smart Business asked Spears to provide an inside look at what makes a truly effective CRM program.

What makes CRM a growth initiative for companies in this market?

A lot of companies have downsized or reduced their overall sales staff and are putting CRM in place to retain productivity. When a salesperson leaves, all the leads that person was working on and all the information he or she had about accounts leaves with him or her. If a company has tracked that information over the course of that person’s employment it has the ability to go back in and see who the person was talking to and what the communication has been thus far.

The CRM system is really meant to cover a 360-degree view of a customer, from before they’re a customer through how you market to them, what material they are receiving from you as an organization, and then how you handle it when they start to express interest.

The back end of a CRM system involves the service requests coming in from those clients, which helps the service organization keep track of which clients are very intensive in their needs and understand the cost perspective. It also helps the account or sales manager going to a client site because they can access the client’s history and see the service requests it’s



Chris Spears
Director of business development
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had in the past, what areas they should avoid, as well as the areas they need to cover with the client.

How does a well-designed CRM program improve sales processes?

The first step with implementing a CRM system is to look at the existing sales and customer service processes. If you’re automating some of the steps of a bad sales or customer service process and putting it into an electronic format, it’s still a bad process. It’s another matter if a company can recognize the flaws and wants to start gathering data so that it can make improvements.

Once companies start tracking all of that information they can then go back and look at the analytics to statistically see how clients responded after receiving a piece of communication. If you never heard from them again, what was it about the communication that scared them off? CRM enables companies to improve their sales numbers by reviewing how their current process is working and then making improvements to it constantly.

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How adaptable is the CRM software?

You can evolve the system and the terminology that’s used throughout the system to mimic your business and how it approaches its accounts, contacts and opportunities. For example, in customer relationship management, the ‘customer’ could be a patient. You can rename the CRM system so that it matches your industry or even make it very specific to your company terminology.

Right now, the standard CRM automatically tracks communication like e-mails being sent to clients or calls made on a phone that’s connected to a computer. As CRM technology advances, you’re going to be able to make a record of when a contact calls a cell phone or track when you send out a Twitter. It’s going to expand into the different areas of communication that you want to be able to track.

How can businesses make sure they’re getting the most ROI from a CRM program?

The No. 1 problem companies have after implementing any CRM system is user adoption; a company just spent tens of thousands of dollars on this tool that should make everyone more productive, but nobody uses it. You have to be able to explain to the people who see it as just another tool they now have to use why this is important to the business. This involves walking them through the system and making sure it fits into their own process. Regardless of how resistant some employees may be to technology, almost everyone uses Outlook for e-mail, and the CRM system plugs right inside of Outlook so you don’t even have to leave your e-mail system to use it.

While tracking the information does require a little bit of legwork every time you talk to someone or every time you find a new opportunity, the benefit is that the CRM program doesn’t allow you to forget anything. It’s not like a notebook that you can lose or forget to look at before an opportunity has come and gone, and it alerts you to inactivity around specific opportunities or high-value clients. <<

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