

Managing relationships

How CRM software can give you a 360-degree view of your customers **Interviewed by Sue Ostrowski**

When several people at a company are working with the same client, information can get lost and opportunities can be missed.

But with a customer relationship management (CRM) program, all of your data are in one place, keeping everyone who works with that client on the same page.

“When you have a lot of people interacting with customers, those people aren’t necessarily talking to each other every day and not everyone knows everything about the customer,” says Eric Stoll, director of technology at Arke Systems. “CRM brings it all together and makes all that information available to everyone who needs to look up that account.”

Smart Business spoke with Stoll about how CRM can help you grow your business and the first steps to getting started.

What is the benefit of CRM?

CRM is software that allows businesses to manage their entire operation with a more customer-centric approach by employing a central database. The database tracks all of their customers’ information that’s relative to their business and also helps manage the business processes to interact with those customers.

A lot of people use it to focus in on sales and marketing and servicing those customers. Once you have your business focused on a CRM platform, you can go back and start analyzing how your business is doing and how effective you are at each of those stages and with your interactions with customers.

Can CRM work for a business of any size?

It is effective at all levels. Smaller companies really gain a benefit in their sales because their resources are limited, and following up with every one of those leads and opportunities that they come across can be difficult. CRM keeps you honest and makes you accountable for following up with everyone. That makes a



Eric Stoll
Director of technology
Arke Systems

quick impact on increasing your revenue.

Larger organizations can really benefit from keeping track of everything in one place and having a more 360-degree view of the customer.

What is the first step to get started using CRM?

You can’t implement the entire thing in one step. First, you need to figure out where CRM is going to make the biggest impact in your business. A lot of people start in the sales area, building out and automating some of their sales processes.

Many companies already have a sales process and different stages in that process that define how they’ll follow up with each of those customers. Analyzing these processes will also help them project their sales pipeline.

You need to figure out which area is going to bring the most bang for your buck. To start, you want to collect that data and start using it to make sure you’re following up with customers and actually doing what you’re supposed to be doing in the business.

ERIC STOLL is the director of technology at Arke Systems. Reach him at (404) 812-3123 x130 or eric@arkesystems.com.

Is it time-consuming and expensive to get a system up and running?

It depends on how well the process has already been defined within the business. Some companies have a very well-defined sales process and they just happen to manage it on spreadsheets or a whiteboard. Moving something like that into a CRM doesn’t necessarily have to be expensive or time-consuming.

If a company lacks these front-end processes, it will need to invest time and money into developing them before the company will be able to implement them through CRM. The first 90 days of using CRM is the critical period. With everyone on board and using CRM, a company should be able to start to see the benefits of using CRM at about the 90-day mark. In the first 90 days, CRM may not affect every part and angle of business, but you should be able to see where it will have the most impact. You should re-evaluate how you are leveraging CRM to get more information out of it for your business.

How does CRM software help salespeople better target potential customers?

You can watch where your marketing is more effective, what verticals and industries you are getting more sales from, but you can also look from a service point of view and find out where the most repeat business is coming from. You can then make sure you’re focusing your sales toward the areas you’re better at servicing.

You can also look at where sales have traditionally been made faster or where you’ve had bigger sales and focus it on those areas. <<