



CRM Best Practices

Sales, Marketing and Customer Service

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Seven Steps for Moving Customer Service from a Cost Burden to a Strategic Asset

On the battleground of today's business environment, the customer experience has become the competitive differentiator.

And those that fail to take customer service seriously take the hit on the bottom line:

- The average business loses 50% of its customers every 5 years
- New customers cost 7-10 times more than retaining an existing one
- An increase in retention of 5% can increase profits 25-75%

As the term "customer relationship management" implies, your goal is maintaining strong relationships with customers. It's the feelings evoked during interactions with your organisation that leave the greatest impression.

So, if you're not romancing your customers, who is?

Companies that maximise the customer experience - and keep customers for life - typically follow these best practices:

1. Make support a top priority

Gartner Research stresses that "organisations need to treat customer service as a top business objective - not as a stand-alone department." Yet, many don't look at this function as an integral part of their strategy.

In fact, Aberdeen Group research found that just 45% of senior-level executives report support centre initiatives are critical to their company, product and customer strategy. Based on the stats above, it's clear that, when you give this part of the business the resources and attention it needs, you keep customers, thereby lowering their costs and increasing profits.

2. Personalise service

According to The Centre for Customer Driven Quality at Purdue University, "92% of U.S. consumers form their image of an organisation based on their experience using their call centre."

Every customer wants to feel like they're the most important customer - instead of just a number. Accomplishing that means providing truly personalised service.

Contact centre reps should know what products and services the customer currently uses, the issues and concerns they have had in the past, and who else has talked with the customer and what transpired. With that information, they can respond to each customer intelligently and personally. With a centralised customer relationship management database, with company wide access, organisations track every interaction with customers. That way, everyone interfacing with a customer knows exactly what has transpired in the past and can respond accordingly - improving and expediting resolutions.

3. Integrate all systems

In addition to a centralised CRM solution, it's important to integrate all information systems that might be involved in customer interactions in order to support the total experience. For example, tie your CRM system with your accounting software to ensure that everyone knows of any outstanding accounting issues with that particular customer.

If you have two different applications for support and sales, ensure that those talk to each other. That way, sales knows about pending service issues and support agents are aware of sales in progress. All can then respond appropriately to customers. The latest CRM solutions even include case management capabilities in a single software solution, eliminating the need to integrate separate applications.

4. Be accessible

Because every customer has a different schedule, and varying communications preferences, you must support them when, where and how they prefer. It's all about access. "Access will define those companies who do it best because best is what customers are expecting and looking for, and accessibility is what they want. If you don't deliver consistent, attractive accessibility, someone else will," according to a report by The Centre for Customer Driven Quality at Purdue.

Give them the option of communicating via voice, e-mail, Web or online chat, and access to self-service options like searchable knowledge bases or forums. Also be available for all the time zones that you serve, ensuring that anytime a customer needs help, they have an option that suits them.

5. Be fast and be smart

Customers don't have the time or the patience to be routed around to different people, telling each support rep the same story again and again. They expect rapid resolutions. Lack of integration between telephony and customer relationship management solutions causes such disconnects.

Fortunately, new customer relationship management solutions, integrated with voice capabilities, help dramatically expedite calls and lower the cost of service. For example, the solutions can intelligently route calls to the right (best-skilled) support agent based on the specific customer calling and their issues. Customers are recognised by identifying information in existing databases, or by simply entering an ID upon calling. When agents answer, the customer's call record pops up on the screen, allowing them to immediately begin assisting the customer with their specific needs.

If the customer is routed to another agent, that agent sees the same screen. Such systems can also prioritise calls for VIP customers or based on the urgency

of the customer's issue. All this reduces wait and response times - and makes for happier customers.

It also ensures that you use your support resources more effectively. Calls go right to the agents with the skills to handle them.

6. Automate repetitive processes

You can automate a number of recurring, mundane tasks to expedite resolutions for customers and take some of the burden off support agents. For example, let callers create their own tickets or leave voice mails any time of day and then leave it to your CRM system to route them to the right queues automatically.

Inform customers of the status of their service tickets automatically through e-mail or automated phone calls, coordinated through your voice system. Likewise, have tickets close automatically and collect feedback from the customer.

Even automate routine tasks like password reset - one of the most common reasons for calls. Let customers reset their system or domain passwords automatically, freeing agents to handle more complex tasks

7. Analyse support experience and metrics

By tracking support issues in a centralised database, you have a complete record to gain a big-picture view of your performance and identify trends. Use that information to answer some of these critical questions:

- " What's bothering our best customers?
- " What are the top support issues?
- " What issues are occurring across different types of customer, products or geographies?
- " What steps are we taking to reduce the most frequent issues?
- " Are there suggestions for improvement disguised as complaints?
- " Are resolution times decreasing?
- " What's the average hold time?
- " Are hold times and abandon rates decreasing?
- " Is each agent able to process more calls?

By analysing this information weekly or monthly, you'll be able to tweak your support processes and realise continuous improvement - ultimately improving customer retention, reducing the cost of serving those customers, and increasing profitability.

Ten Tips for Converting Leads to Sales for Increased Returns

Every customer relationship begins as a lead. And like a seed that becomes a tree, a lead must be nurtured under just the right conditions to grow.

Marketing, the first phase in the lifecycle of the customer relationship, must keep a steady stream of leads coming in, and then build the relationship until those prospects are ready for sales.

Organisations that effectively get leads to the next level follow these 10 best-practices steps:

1. Define “customer” and “lead”

Before starting any lead generation activities, it's essential to know what you're looking for. What's the profile of your desired customer? Start by assessing your current customers to create a profile in terms of factors like revenue, industry, number of employees, location, and the titles of contacts. From there, you can answer the question, what makes a good lead for our organisation?

2. Create a process

The goal of marketing: generate leads that ultimately lead to new customers. However, without an effective lead-management process, leads may not be nurtured and tracked effectively – making it tough to know if your marketing efforts are working or to hand off solid leads to sales.

Establish a clear process for handling and distributing your enquiries and leads, and then automate it using a contact management solution. Based on your definitions of your ideal customer and lead, score enquiries and leads, sort them into categories, and then apply specific processes for moving those relationships along.

3. Get a centralised database

So, how do you manage leads across your organisations as they evolve into sales-ready opportunities? A centralised database allows you to store every contact as it comes in, and ensure that everyone involved has a complete, up-to-the-minute record of every interaction with that lead.

With an intelligent database, you can organize leads by type, level of readiness, etc., enabling you to tailor communications specifically for those groups. Each group might receive a different message or offer targeted at their needs and what drives them.

Accessible by marketing and sales, everyone in your organisation knows exactly where a lead stands and next steps.

4. Build the relationship

Remember, you're not selling to a company, but rather to a person. Leads turn into customers only when buyers feel they have developed an ongoing relationship with you and your representatives, separate from their decision to buy.

Take that valued contact through a series of steps and interactions to build the trust necessary for prospects to choose to work with you. By providing relevant content for their specific needs, at the right time, you effectively engage in a dialogue with them even before any actual sales conversations take place.

5. Collaborate internally!

Sales and marketing are two parts of one goal: acquiring new customers. Yet, too often one hand operates without knowing what the other hand is doing – ultimately affecting sales.

The answer to a more harmonious, productive relationship? An understanding of what marketing tactics are working to bring in quality leads, and how well those leads work for sales. Develop an ROI on the process and continue refining for better and better results. Also make sure that marketing and sales both know the definition of the target customer and lead.

6. Nurture your leads

Successful lead generation goes far beyond simply acquiring leads. It's about evolving those leads from enquiries to a sales ready state. Again, accomplishing this depends on aligning marketing with sales.

An effective nurturing process seeks to truly understand the customer and their current needs, and delivers relevant dialogue around those needs. Make sure you understand the prospect's challenges, goals, and when and how they want to receive communication from you. Respect those concerns and wishes and you go a long way toward building the relationship.

7. Close the loop

The only way to improve your marketing efforts is to know what's working and what's not. "Closed-loop" reporting refers to the process of measuring results against efforts to determine a return on your investment.

According to Aberdeen Group, in its Creating a Customer-Centric Marketing Organisation report, the group's research found that "companies that adopt closed-loop marketing processes are more than three times as likely to report a greater than- 50% return on marketing investment (ROMI) than those that do not." Pretty powerful statistics.

The report goes on to say that companies accomplish this by using the right metrics, differentiating capabilities, and applying integrated and sophisticated technologies. By tracking every activity and result, these organisations can easily measure the effectiveness of their efforts.

8. Track and tweak

What works for one type of prospect may not work for another. Only by tracking every interaction with every lead can you know which series of events led to desired results and which were less effective

With that insight, you can tweak your marketing model, the specific processes that take place on the road from inquiry to sales-ready. For example, what combination of outreach and lead nurturing, through what avenues, produced the best results?

9. Market to existing customers

Once you acquire a customer, the marketing doesn't stop there. Existing customers know you and trust you, giving you the opportunity to continue a relevant, and deeper, dialogue with them. If anything, it's more important than ever to communicate with them to ensure they get the most from your products and services.

Through ongoing communications, webinars, events, etc., continue educating them about your products and services. Help them understand how they can do business better not just with the products and services they currently use, but with other offerings.

10. Make reporting easy

As a couple of the steps reinforced, reporting is critical. But it's also important to ensure that marketing and sales teams can do this easily. They should spend their time generating leads and closing business, rather than manually crunching numbers. To that end, give them centralised databases for complete tracking, enabling them to simply run regular reports on their own with all the information they need. If organisations follow these steps, they will undoubtedly begin to see improved results.

Ten Tips for Helping Sales Crush Their Number

Sales is simply not what it used to be. With global competition, it's increasingly tougher to gain access to decision-makers and close sales.

More than ever, organisations and their sales reps need to apply best practices approaches. Those that do are substantially more successful in winning business. Follow these 10 tips to help sales sell:

1. It's all about the process

CSO Insights, in its 12th annual study (The Impact of Sales Process and CRM on Optimising Sales Effectiveness), looked at sales at more than 1,000 organisations. In the study, CSO identified four levels of "process prowess."

The select few at the highest level, Level Four, formalise their approach to selling. They clearly define what should take place at every step, from qualification to education to proposals.

With rock-solid processes in place, those companies saw significantly better sales performance results:

- Better sales skills among reps
- More reps at or over quota
- Lower voluntary turnover
- Higher conversion rates
- More meetings
- Close rates about 16 percent higher

2. Map a workflow

With selling stages and tactics defined, sales reps then need a way to stay on that path and actively track each step in real time.

Level Four sales organisations go beyond simply setting up tabs in the opportunity management module of the CRM application for each selling stage, but involve full workflow definition – exactly when and how activities should take place. With a workflow, organisations speed the process, save time for reps and shorten sales cycles.

3. Free sales to sell

It's important that reps don't get bogged down by details. Let sales focus on selling by turning mundane tasks over to sales force automation software.

Such systems take care of the repeatable parts of the process that don't need a human touch. For example, automatically send a specific communication to a prospect – tailored to his or her specific needs. Or, route quotes above a certain amount to the appropriate approvers, saving reps that e-mail time. When a new customer signs on, have the system notify accounting with the details needed to

get that customer set up in the accounts receivable (AR) system. These are just a few of the many tasks that sales force automation software can take care of.

4. Centralise information access

A centralised customer relationship management database is critical to your sales efforts. Sales reps need to know exactly where a prospect or customer stands – what communications they have received, events attended, and if there are any service or accounts payable issues. This eliminates duplicate effort and ensures the appropriate communication with prospects and customers.

Likewise, those in other customer-facing departments should have access to a complete, real-time customer view at all times.

Everyone interfacing with a contact can reference current activities and keep an eye on promises made. New customer relationship management solutions with built-in case management capabilities make this even easier, bypassing the need for any integration with separate applications.

5. Simplify record-keeping

Along those lines, also make it very easy to capture every customer interaction. If logging activities takes too long, it takes time away from selling – and sales simply won't do it. Your centralised database should automatically track activities such as mailings and e-mails a contact receives. CRM software also simplifies the logging of all inbound and outbound communication with features like one- or two-click call record functionality.

6. Empower sales

Every sales rep has a unique selling style and preferences. However, many customer relationship management solutions remain inflexible for each rep's different needs. Typically, the IT department customises the solution once – locking in the way information is filtered – and the entire team uses it the same way.

New sales force automation capabilities, available in CRM software, empower sales to create dashboards that suit their working styles. These flexible SFA tools allow for unlimited customisation, while users point and click to accomplish what they want. If having fields that show the type and quantity of products purchased by a customer in the last six months is important to them, they can add it. If they want to create sub-zones for sales calls or establish a regular route for greater efficiency, they can do it. That simplifies the entire sales process, and ensures salespeople have what they need, when they need it.

7. See your pipeline

A sales manager should never be surprised when month- or quarter-end quotas are not met. Successful sales organizations effectively monitor their opportunities in order to project future sales. When sales people have an easy way to log, manage and project their opportunities, they and their managers have true pipeline visibility. CRM software allows managers to clearly understand the state of the selling process through any sales stage, and users to compare sales to quotas. Plus, they improve the accuracy of the forecasts they deliver to management.

The latest CRM software goes even further. Opportunity creation wizards guide users to schedule follow-up tasks, track important customer information, and suggest ways to increase revenue and assist the close of sale.

8. Measure your efforts

Level Four sales organisations measure their efforts early and often. That means real-time tracking of sales in progress and looks back at what worked. With reporting that's built into a company's CRM software, users can understand their individual performances, while managers can view active opportunities. If a potential sale falls outside of predefined rules of expected progression, the performance dashboard will call it out. Sales managers can analyze each deal and see where and why it may be drifting off course – then take proactive steps to correct the situation. It also helps teams determine if their processes and workflows are effective. By analysing which sales process consistently closes deals the fastest, they can tweak their methods for better results.

9. Support cross-selling and up-selling

CSO Insights also found that Level Four organisations with CRM, due to their clearly defined processes, experience notable improvements in their cross-selling/up-selling results – 60 percent for Level Four compared to 20 percent for other organisations.

Additionally, these firms did much better in selling value/avoiding discounting (73 percent versus 35 percent) – which immediately contributes to their bottom line.

10. Share best practices

Finally, as sales teams more actively manage and analyse opportunities through CRM systems, best practices begin to emerge. Managers and reps can determine in which markets they sell most effectively, which competitors they have a higher chance of winning against, and what sales tactics help shorten the cycle. Share those findings across the team to refine best practices and improve results.

About FrontRange Solutions

FrontRange Solutions USA Inc. provides CRM solutions used by more than 130,000 companies and over 1.7 million users to automate and manage customer-facing initiatives. GoldMine is designed for businesses that want a complete and customizable solution that manages every aspect of the customer lifecycle with a quick time to benefit and low total cost of ownership.

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