PUTTING THE i IN CRM

The benefits to the individual and the entire business.

Faye Business Systems Group

SUGARCRM

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EXECUTIVE SUMMARY

Customer relationship management (CRM) software has been used by organizations of all types and sizes for over 20 years. However, few have managed to tap into the true potential of CRM.

Many businesses have used CRM tools inside their sales, marketing and customer support departments. But this often creates "silos" of data and expertise that are not widely shared with the rest of the company—making it impossible to fully streamline customer processes.

The lack of widespread CRM deployment stems from organizations choosing inflexible tools that cannot be integrated, or ones that are too expensive to get every customer-facing team member synchronized, regardless of department. That's because traditional CRM systems were designed to give managers reports to provide visibility into sales and business performance. They weren't created to improve the performance of individual employees with customer-facing responsibilities. As a result, most people who use CRM software view it as a time drain instead of a powerful, efficient tool to help them be more effective.

When organizations deploy a CRM system that is designed with individuals in mind, both internal users and external customers win. Employees become more productive when they gain access to more insightful business data. In addition, this more personalized approach to CRM can lead to increased customer satisfaction because customers feel like they are being treated as valued individuals with unique requirements. And when the CRM system is priced so that every customer-facing employee can now have access, these benefits are significantly magnified.

THE POWER OF CRM FOR THE INDIVIDUAL

To fully reap the benefits of CRM for the entire customer-facing organization, those who use the system every day must actually want to use it. No matter how grand your plans are for CRM, they will fall short unless every user is committed. Getting every employee on board who supports customers means giving them a solution that works the way they do – as individuals. Each individual needs to see the system as a personalized, powerful tool to perform his or her job more effectively. Then, the organization can start to behave as a single, organized entity towards every customer.

CRM that individuals actually want to use has to render information quickly and easily. To start, users should see all of the most relevant information about a customer on a single page without having to navigate several windows or screens. They must be able – from a single system – to use and share data easily across departments to foster a culture of collaboration. Individuals need an easy way to make the system their own, configuring it in just a few clicks without involving IT resources. Additionally, they should also be able to consume data from their own social and professional networks right inside the system to connect on a more meaningful level with every customer.

And CRM for the individual must be highly mobile. Not only must the user have access to their CRM data anytime, anywhere, but the experience must also be uniform across every device. Users should not have to learn how to use a different system for every CRM touchpoint. The experience must be simple and consistent, yet powerful and effective regardless of device.

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CREATING A UNIFIED VOICE TO YOUR CUSTOMERS

In addition to offering innovative, individualized CRM, it is also important to equip more than just quota-carrying sales reps and customer support agents with access to CRM functionality and data. Today, many more individuals touch the customer, or are part of a customer-facing process, in addition to sales and support professionals. By equipping everyone who interacts with customers, organizations can further optimize processes, increase service levels, and boost customer loyalty.

Let's take a look at some examples of how CRM built for the individual can and should include more than just core sales, marketing and support professionals. Again, to fully leverage the benefits of CRM, all employees that touch the customer must have access to core customer data, with the ability to connect and share information and expertise across the entire business.

Accountants

Many CRM systems are configured to allow sales users to easily see data from the accounting system — such as purchase and payment history for their customers. But the accounting team can gain value from direct access to CRM too. They can quickly and easily align invoices and customers for faster, more accurate billing. This generates revenue faster while freeing the sales team to focus on selling. With enhanced customer data, accounting professionals can better understand each customer as an individual, gain insight into each deal, and understand and optimize cash flow while keeping customers happy.

Customer Support Agents and Field Agents

Customer support agents are a valuable resource, and need access to critical data in CRM. By using CRM as a complete repository of customer data, support agents can better understand each customer. Agents can have instant access to complete histories, providing more personalized support, thus increasing first-call resolution rates and driving higher levels of customer satisfaction. Also, with a core CRM in place in customer support, agents at the call center and in the field can more effectively collaborate around customer problems, share best practices and seamlessly prioritize and escalate the most pressing customer issues.

> *"Today, many more individuals touch the customer, or are part of a customer-facing process, in addition to sales and support professionals. By equipping everyone who interacts with customers, organizations can further optimize processes, increase service levels, and boost customer loyalty."*
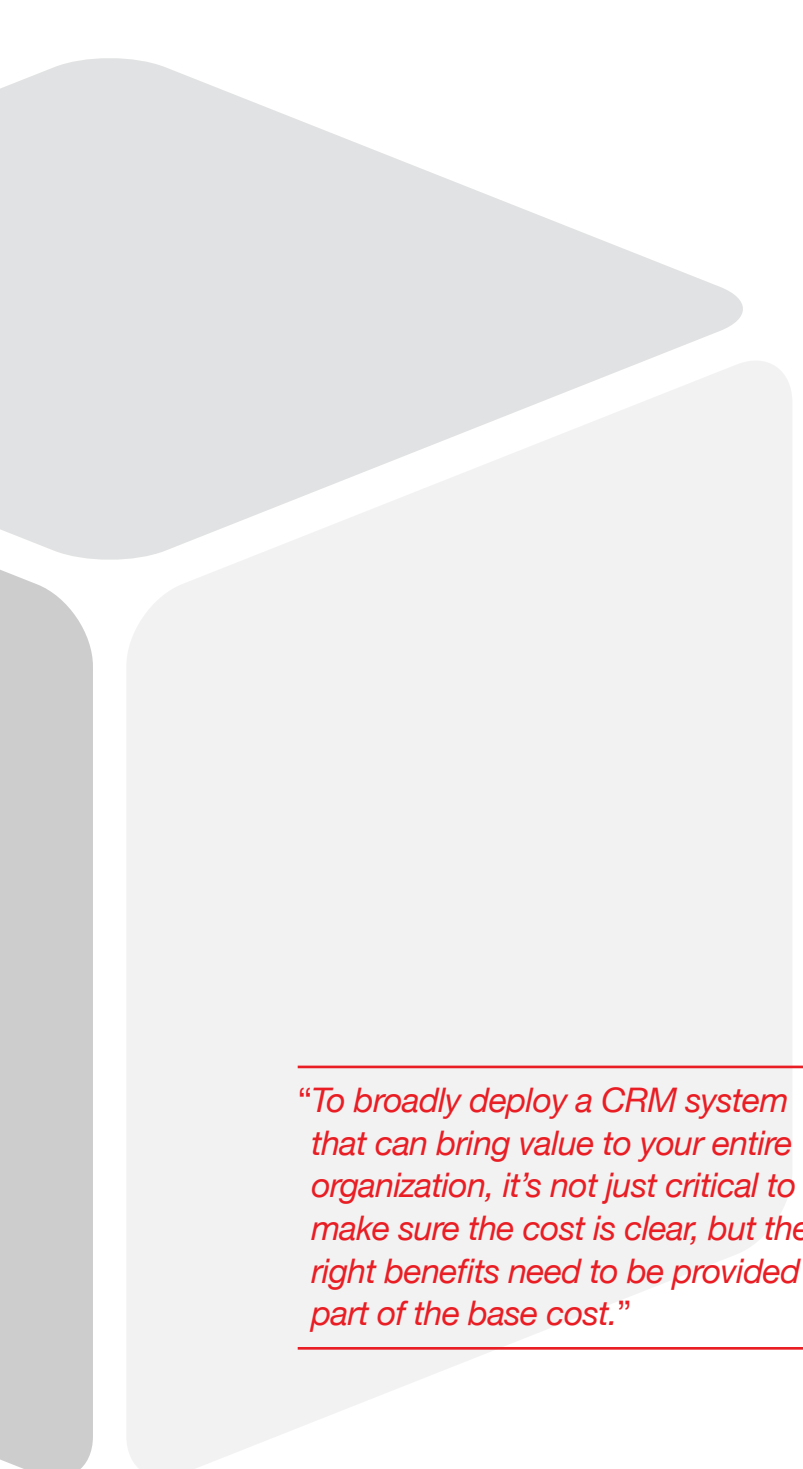
Product Managers and Designers

Individuals who actually design or manage the creation of products and services continuously look for new ways to deliver value to the customer through enhancements. These experts are locked out of the CRM system in many organizations. An affordable CRM system allows sales and support reps to call on expert help in real time, providing essential pre-and-post sales support that goes above and beyond. They can stay on top of their tasks required to close the deal without tracking endless emails or searching for documents filed in complicated systems. In addition, the CRM system can show product experts what customers truly want and need in the products and services offered, therefore improving offerings to align with true demand.

Project Managers

For businesses that sell services, it is particularly important to provide project managers with access to CRM. Project managers serve as the conduit for keeping the company on track to deliver services on time and on spec. By tracking major milestones through CRM, the sales, support, and finance teams all have visibility into the success of a project and can pitch in when a problem occurs.

Receptionists and other Front Office Employees

All too often, the true "front line" of customer response is ignored in a CRM deployment. Receptionists, and anyone else who may field a customer call, can benefit from access to a simple yet effective CRM tool. By quickly identifying the customer, their history, and level of value to the organization, those who take inbound calls can deliver a level of customer knowledge that differentiates them from competitors. They can also more efficiently route calls, solve basic problems, or answer common questions.

THE VALUE OF CRM

Expanding CRM usage to a wider set of users might seem like a costly endeavor. And with many CRM systems, this can absolutely be the case. A lot of CRM providers simply look to squeeze every last license dollar they can out of their customers.

However, some vendors understand the power of making CRM accessible to a broader range of individuals inside every organization, and have priced their offerings to be more affordable and thus more widely deployed.

The price should also be transparent. Not just for the initial deployment, but for the foreseeable future as well. This means no hidden fees, forced upgrades to more expensive editions based on arbitrary limitations, or "nickel and dime" fees for required features such as mobile access.

To broadly deploy a CRM system that can bring value to your entire organization, it's not just critical to make sure the cost is clear, but the right benefits need to be provided as part of the base cost. The system must offer more than Sales Force Automation: No organization should have to buy three or four different systems to manage core customer data. The CRM system needs to provide case management, integrated marketing and robust reporting tools in order to deliver a true 360-degree view of the customer. It needs to integrate easily and cost-effectively with internal and third party systems. Also, be sure that the CRM provider does not place arbitrary limitations on the product, which can lead to excessive additional charges or force unnecessary upgrades to more expensive versions. If you take a closer look at costs and capabilities, it becomes clear that all CRM systems are not equal in value received for the price paid.

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CONCLUSION

Your business is unique. Individual. Just like every employee in your organization. To truly stand out, you need to differentiate from your competitors and delight your customers. In today's fast-paced world, it is becoming harder and harder to do with traditional, old guard CRM technology.

By deploying modern CRM tools designed with individual users and individual organizations in mind, you can take a giant leap in the right direction. That is because empowered users ultimately equate to more informed business decisions. And when IT has flexible, powerful tools to work with, they can easily develop the kinds of user experiences and optimized processes that ensure you will have a true competitive edge

The good news is that the ease of today's cloud-based technology makes it even more cost effective and painless than ever to get started. When the technology works the way you work, and within your budget – your only limitation is your imagination.

COMPANY OVERVIEW:

Company Name: Redglaze Group

Employees Using Sugar: 74% across executive, design, project management, and accounting departments.

Location: Omaha, Nebraska

Description: Redglaze Group an architectural and engineering group with a technology background, whose companies provide products and services to the construction industry.

Website: redglazegroup.com

"Sugar allows us to behave as a very organized, professional group because we have the ability to empower our salespeople, project managers, engineers – anybody – to get the right data, the right answers, to the right people at the right time."

Dave Meinzer, President, Design Logistics Redglaze Group

CASE STUDIES

Redglaze Group

Redglaze Group consists of eight affiliated companies, each with unique requirements for their CRM system. The companies under the Redglaze umbrella provide a range of architectural design and engineering services for some of the largest brands around the world. In the low-margin construction industry, it is critical to streamline operations and present a consistent, high-quality customer experience throughout an extended customer relationship that runs from pre-sales, through concept and design, to construction and ongoing maintenance.

Customers typically work with multiple companies within the Redglaze Group, so information needs to pass seamlessly not just through the sales and project management processes, but also across the entire organization. To meet these needs, Redglaze created a cross-company system powered by Sugar, which allows them to provide clear project visibility across companies, automate billing and service processes, and show customized views of customer data, depending on the employee's role in the organization.

Today, within the Redglaze companies using Sugar, nearly 74% of employees rely on the Sugar system to help them do their jobs. This not only includes core sales, marketing, and support individuals, but also accounting, project management, and human resources personnel as well. In addition, since Redglaze's projects involve a lot of subcontractors, the company needs to provide critical job information to these individuals while protecting confidential customer data. The flexibility of Sugar allows Redglaze to quickly configure processes and data access levels to provide necessary information while still optimizing billing and management on each project. This has allowed Redglaze to streamline their business by sharing resources, gain a 30% improvement on the efficiency of sales and project management teams, and increase the consistency of customer interactions across all companies.

"Over the long run these efficiencies will provide a more profitable approach to how we engage with our customers. We couldn't have done that without implementing a solution like Sugar."

Jim Glickman, CMO
Hilco Appraisal Services

HILCO APPRAISAL SERVICES

Hilco, an Illinois-based financial services firm, faced a number of challenges in managing its sales and project delivery process, which caused significant inefficiencies and duplication of effort across the organization. There were multiple systems within the business that independently housed and tracked identical customer and project information. As CMO Jim Glickman states, "We might enter the same information into 10 or 15 different places. That is not an efficient way of doing business and it takes our people away from serving customers."

Hilco knew it needed to present a consistent face to prospects and reduce the number of data silos in the organization. The company also wanted to provide a seamless customer experience across the board in order to stand out from the competition.

To accomplish this, Hilco went to work with SugarCRM partner Highland Solutions to build a comprehensive approach to its customer-facing operations. Using Sugar as the core platform, Hilco reinvented its customer processes around a unifying system called "ESSTER" (Engagement, Set-Up, Scheduling, Tracking, Evaluation and Reporting).

ESSTER was designed to streamline the processes surrounding the customer lifecycle and get all of its customer-facing employees on the same page. The Sugar-based system acts as a single source of truth around every customer so anyone, at any stage of a process, can access and understand the entire customer history. This consolidated system also provided more in-depth and insightful reports, enabling Hilco to make more informed business planning decisions.

All told, nearly every one of Hilco's employees now accesses ESSTER on a daily basis. Not only has Sugar helped Hilco save hours of processing time and drive deeper insights by using a widely-adopted system, it has helped Hilco set itself apart in its marketplace. The company can now provide a streamlined, efficient experience for its customers and distinguish itself with a higher level of customer service – having given every stakeholder access to critical customer and business information in a highly usable, centralized system.

SugarCRM

SugarCRM's market-leading Customer Relationship Management (CRM) platform delivers an indispensable tool for every individual who engages with customers. From sellers, marketers and customer support agents, to receptionists and executives, SugarCRM provides enhanced intelligence around every user, helping employees make better decisions and create extraordinary customer relationships.

www.sugarcrm.com

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