# PUTTING THE "i" IN CRM

Series 1:
The Impact to the Sales Team.

ebook

SUGARCRM

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# EXECUTIVE SUMMARY

*Customer relationship management (CRM) systems have long been seen as beneficial to any sales organization. However, CRM benefits typically favored management – while the "front line" users of CRM, the sales representative, saw CRM as a necessary evil. Traditional CRM systems have been seen as inflexible, time-consuming productivity drains.*

But that notion of CRM is becoming outdated. Modern CRM solutions are available today, which shift the focus of development to the end user – the individual. By designing CRM with the individual user in mind, the entire sales organization benefits from increased data quality, enhanced sales productivity, and more predictable revenue pipelines.

And while it is one thing to equip quota-carrying sales representatives with highly personalized CRM tools, the success of sales organizations goes beyond simply empowering sales reps and managers. To truly reap the benefits of a CRM initiative, every single individual that supports the sales process must have access to the system. This ensures everyone is on the same page, and able to collaborate and sell more effectively across the board.

To reach this level of enhanced sales automation, organizations must choose the right CRM. One that is not only focused on the individual user, but priced in such a manner that putting the solution into a more expansive user group remains cost effective.

The following sections illustrate the benefits of CRM for the individual through key use cases. In addition, they outline the importance of providing access to CRM to the extended sales organization – and the benefits a sales organization reaps when ALL individuals, not just reps and managers, are on the same page.

Sales automation tools designed for the individual provide unique benefits to today's busy sales professionals. With so much data available around every customer, sales professionals need a CRM that not only can access all of this data, but present it in a simple, clear manner that allows the sales rep to consume and use the data in their everyday activities. The core tenets of this enhanced user experience should include:

- All pertinent customer data available on a single, easily navigable screen
- Ubiquitous experience across any device
- Highly configurable Intelligence Panels to render critical data from nearly any source
- Simple, fast personalization tools to help sales professionals make the system their own

# SECTION I – EMPOWERING THE INDIVIDUAL

For a CRM system to be successful, it must be utilized every day. By shifting the focus of CRM design to the everyday user, organizations will see a sharp uptick in usage, followed by increases in data quality and overall visibility. Let's dive deeper into some usage scenarios and benefits where having a CRM designed for the individual pays dividends.

## Know each customer as an individual

Like most organizations, sales agents are charged to "do more with less" every day. While quotas may increase, typically the number of sales reps expected to meet said quota stays the same. Also, sales professionals today are tasked with selling to a customer base that is more informed and socially connected than ever. So, how can sales agents see their CRM system as a tool to provide more personalized service?

The key is in the design of the system. A modern, intuitive CRM tool should understand the needs of busy sales reps suffering from information overload. By filtering data, and presenting only what is most relevant on a single screen – sales reps can get what they need to know about specific customers – when and wherever they need it. Therefore the system should be intuitive and provide a similar data rich experience across any device.

The system should present data in a way that lets users take action, not simply punch in data after a phone call. And, that system must render relevant data from the CRM system itself, as well as internal and third party systems like accounting and social media. These include professional social networks like LinkedIn, social feeds like Twitter, and data services like Dun & Bradstreet. Having a richer set of data immediately available to the sales rep allows them to know their customers as individuals, and provide a level of service above your competition.

In short, there is more data than ever available about your customers. Sales organizations need to take this "big data" explosion and reduce it to "small data:" comprised of only what is most relevant to a sales professional at the point of engagement with their prospects and customers.

Sales professionals do not always sell alone. And with contextual, integrated collaboration tools, sales reps can gain fast access to the knowledge and experts they need. Seamlessly embedded collaboration tools allow users to quickly access relevant system and human created data inside intuitive activity streams. Users can quickly access and share rich media, web links, and other documents right inside the stream. With collaboration tools right inside the CRM, expert help is only a click away.

## Sell as a Single Team

Sales professionals are usually seen as mavericks; out there on their own finding and closing deals. But the reality is, sales is about teamwork. Yes, reps do a lot of the closing and managing of accounts themselves – but with today's ever more informed customer – reps need fast access to not only information, but also internal company experts.

Modern CRM systems need to be highly collaborative tools for sales professionals to connect and glean information from expert sources across the organization in marketing, finance, and operations. These tools need to be as simple to use as the consumer-oriented mobile apps today's professionals use everyday in their personal lives. And, these tools need to be to the point – filtering only the most relevant information about the lead, account or opportunity at hand.

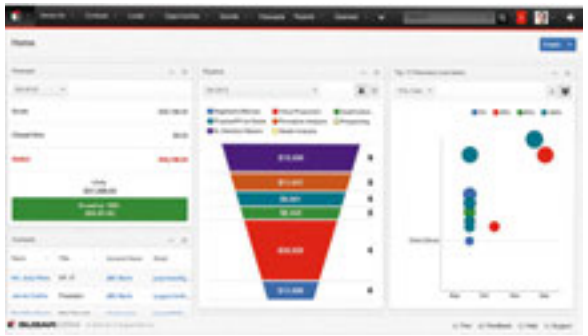
While today's consumer may know more than ever before entering the sales process, sales professionals can gain an edge with effective collaboration tools. With seamless access to knowledge and internal experts, sales professionals can address questions prospects pose, and provide pre-sales service with their team as a single, seamless entity.

CRM for the individual sales representative means rethinking forecasting from the rep's perspective and offering more back to the rep than to management. Forecasting has to be simple. Allow users to add opportunities into their forecast with a single click, and allow them to save multiple forecast drafts before committing to management – to create their ideal path to quota. In addition, sales users need to easily see the effect of including or excluding items in their forecasts through charts and visualizations.

## Forecasting as a Path to Quota, Not A Time Drain

Nearly every quota carrying sales professional needs to submit sales forecasts. And, nearly every sales rep hates to do it. Why? Because traditional CRM systems' forecasts modules are either difficult to use or simply too time consuming to provide value. Forecasts are then seen as a time drain, and reps do not take the time to properly or accurately enter forecast data. Therefore, true visibility into sales expectations is vastly diminished.

But what if forecasts were not only easy, but actually seen as a tool for individual reps to find the easiest or most profitable path to quota? By designing forecasting tools with the sales representative in mind – forecasts become more reliable and revenue more predictable. Forecasts need to be simple, intuitive, and enable reps to see the impact of every deal on their quota in powerful graphical formats. Sales organizations must evolve past a spreadsheet-based, static approach to forecasting and offer reps more dynamic tools to better visualize their paths to hitting their numbers.



Managers need CRM built for the individual as well. In addition to personalized dashboards, a well-utilized CRM system benefits managers and executives by providing:

- Increased forecast accuracy
- Greater revenue predictability
- Understanding of deeper customer insights and trends

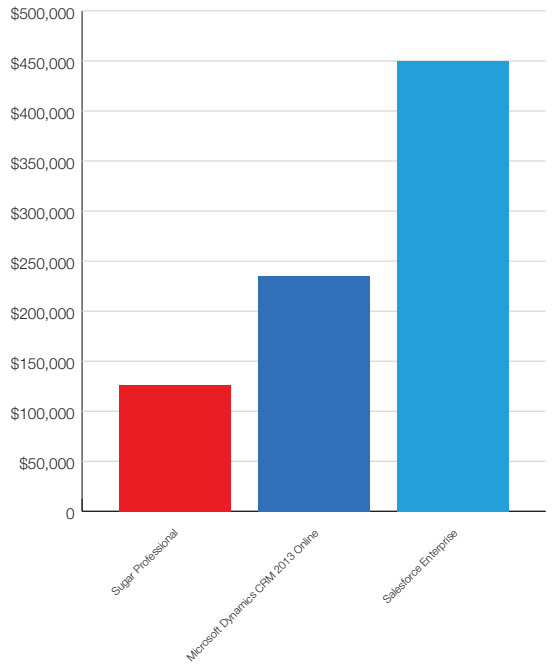
# SECTION II – MANAGEMENT BENEFITS OF INDIVIDUALIZED CRM

When CRM focuses on the individual, management sees multiple benefits as well. By offering your sales reps, and those that support the sales process, useful tools rather than the drudgery of data entry – a CRM system becomes far more than just a central repository of data.

CRM built for the individual sales rep can help increase time to close, win rates, and grow profits by increasing customer retention – all great improvements in management's eyes. But the enhanced data in such a system provides even greater insights. In addition to greater revenue predictability, organizations can learn far more about each individual customer - their buying patterns and preferences. These insights can lead to even greater sales numbers, and a lower cost of sales. When individual sellers connect in a meaningful manner with individual customers, the results are profound.

What's more, managers and executives are individuals too. And just as the CRM should be easily customized to each sales rep's needs, a CRM system only benefits management if it can give each individual manager a unique view into the data that means the most to them. Dashboards must be dynamic, merge CRM data with back office data to get a bigger picture of the financial pulse of the business, and be readily available to management on any device they choose, be it a laptop, tablet or smartphone.

Cost of Ownership for 100 users for three years




CRM needs to be affordable, so that every customer-facing representative can take advantage of its benefits. For example, SugarCRM offers the most attractive TCO in the industry. This is because Sugar users pay a price that matches their needs. No hidden costs, no forced edition upgrades. This enables organizations to put CRM into the hands of more customer-facing users, and deliver stronger sales and higher customer satisfaction.

# SECTION III – EXPANDING YOUR CRM, WITHOUT EXPANDING COSTS

To truly be a customer-centric sales organization, you have to provide everyone that touches the customer with the level of data and insights you provide traditional CRM users. Only then can you fully engage prospects and customers with a unified voice, and ensure that the sales organization's extended support team is always on the same page.

But with traditional CRM offerings, expanding usage can prove to be cost prohibitive. Many CRM systems are simply too expensive to put into the hands of every individual who should have access to such important data and collaboration tools. Conventional CRM systems are fraught with hidden fees, forced upgrades, and additional costs to get the latest functionality. The result: companies restrict access to their CRM system, limiting visibility, and crippling their ability to create extraordinary customer relationships throughout their organization.

When sales organizations choose the right CRM, one priced in such a manner that everyone who touches the sales process can access the system, everyone wins. This means choosing a system with clear pricing, no hidden fees, and an extensible platform that integrates with the external data sources mentioned above without a ton of additional costs.

# CONCLUSION

*Sales organizations reap multiple benefits when they choose a CRM system built for the individual. Not only do individual reps have greater access to customer data in order to better identify and engage with every prospect, their system is seen as a tool that guides their path to quota – not as a drain on precious time. And when reps actually use their system properly, rather than periodically enter data that is useless to them, management wins as well. With more meaningful use comes more data, more insight, more predictable revenue streams. And, of course, managers are individuals too. Providing easy to personalize dashboard tools for management enables greater insight and the ability to make more informed and intelligent decisions.*

And when a highly usable, innovative system is offered in such a manner that organizations can afford to put it in the hands of every customer facing user, the benefits increase even further. When more individuals with insight into your products, services and customers have access to the system, true collaboration is possible. Silos are broken down, and sales reps have unfettered access to the knowledge and experts they need to make the sale and keep customers coming back.

By putting the “i” in CRM, your organization can realize the true promise of CRM for yourself.

To see how CRM for the individual can impact your sales organization, start a free trial of Sugar at www.sugarcrm.com/try-sugar

## 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.

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