The questions you'll want to ask yourself when evaluating a CRM system

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Contact Management

A spreadsheet stored on one of your customer service representatives' desktop is not going to help the accounts receivable manager who's trying to negotiate payment terms with a new customer. And even if that spreadsheet were available over your network, can it truly be easily accessed by your sales managers who are on the road more often than in the office? If more than 2 people in your office maintain customer contacts, you owe it to yourself to evaluate providing them with this simple tool: a shared customer contact database, accessed from anywhere, anytime.

Ask yourself the following questions:

- Does your company have separate accounting, sales, marketing and customer support databases?
- Do many people in your company use paper-based calendars/day timers or standalone calendaring tools like Outlook?
- Does your company have limited ability to track emails sent to prospects/customers etc?
- If the company has a database, are there issues with users not capturing the appropriate information?
- Do customer service reps have any idea how much business the client does when they take their calls?
- Are customer issues and complaints getting resolved adequately and in a rapid timeline?
- Does your sales team have any access to vital accounting data like accounts receivable, credits limits, balances?
- Is information 'hoarded' and kept secret by different departments in the organization?
- Do you have more than 2 employees responding to incoming interactions (i.e. phone calls, faxes, emails, personal visits, etc.?

The right contact management software, deployed throughout your organization, will help you build and strengthen the relationships with your customers, so they'll keep coming back. It will improve your service delivery process, and will increase your staff's awareness of customer needs. And more importantly, it will reduce customer's frustration by not asking the same questions over and over.

Sales Efficiencies

The more you know about your customers and their buying habits, the better prepared you'll be when they're ready to make a purchase. A good CRM system will classify your prospects and help identify your best customers. With detailed information about your customers, you can accurately project and respond to their buying needs through the sales cycle. A good system also acts as a sales assistant to help you automate sales tasks - allowing you to spend more time focusing on strategic sales issues.

Ask yourself the following questions:

- Are forecasts done on paper/Excel Friday afternoons so that the manager can compile them manually?
- Do managers or sales operations have to compile all the Excel spreadsheets to create a report, which is only a snapshot of the past weeks activities, not the current picture?
- Do remote sales people have their own databases that their manager or other team members cannot see?
- If your sales team does not have readily access to vital accounting data like accounts receivable, credit limits, balances etc., how long does it take them to get that information from your accounting department?
- Does your organization have a sales process that your sales teams are supposed to follow but you have no way to enforce it?
- Does your sales management team have issues with proactively managing your sales pipeline and producing timely and accurate, forecasts?
- Do managers have sales reps completing call reports on paper, taking them out of the field?
- Are a large percentage of sales brought in late in the quarter and many at a significant discount?
- Does management spend substantial amounts of time fighting "fires" and little time mentoring, training and coaching their teams?

Sales force automation - SFA - enables you to analyze the entire sales cycle and successfully manage your sales pipeline - from the first contact to final sale. SFA systems provide the tools for sales team to:

- Perform analysis to ensure time and energy are spent on the deals likely to close
- Improve lead distribution and tracking
- Analyze training and performance
- Centralize contact and interaction management
- Effectively process quotes and orders
- Provide remote sales staff with instant access to corporate information

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Marketing Efforts

ACCPAC CRM provides a single source of customer information to help you better manage your marketing efforts and make sound decisions based on the needs of your customers and prospects. With ACCPAC CRM Marketing, you can target the right customer at the right time, eliminate guesswork and put your company's marketing resources to their best use. You can schedule and track marketing activities within a campaign - and view every detail of each campaign.

Ask yourself the following questions:

- Are there issues with branding/consistent messaging occurring because everyone has their own style of writing company letters, with their own letterhead and signature files?
- Are mailings done through the accounting database and most of that costly marketing material is being sent to, and thrown away by, purchasing agents and accounts receivable people?
- Does marketing have issues with accurately measuring ROI on their programs?
- Does it take several days or even weeks for trade show leads to get into the system?
- Are there concerns that those costly leads are adequately followed up and marketed?
- Are visitors on the company web site quickly responded to or followed up on?

In order to build lasting - and more profitable - customer relationships, you need to identify, execute and replicate effective marketing initiatives across all your sales channels. An automated CRM system provides the tools for marketing teams to:

- Develop, target and implement campaigns.
- Manage and analyze marketing budgets.
- Maintain lists and track responses.
- Track collateral distribution.
- Analyze campaign results.

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Customer Support and Service

With ACCPAC CRM, you can make the most of every customer interaction, maximizing business opportunities and customer satisfaction. It empowers your organization with critical information to build and support long-term customer satisfaction and loyalty. ACCPAC CRM brings you real-time access to relevant customer data including purchases, call and escalation history, interactions, multiple contacts, support cases, email and documents sent and received, sales opportunities and more.

Ask yourself the following questions:

- Do customer service reps have a clear view into how much business the client does when they take their calls?
- Are customer issues and complaints getting resolved adequately and in a rapid timeline?
- Are complaining and angry customers the ones that escalates issues to senior management?
- Do clients often complain about poor levels of service/attentiveness?
- How often do you measure customer satisfaction?
- How do you currently track and review all the communications you have with your clients?
- Do you currently have a way of segmenting your clients?
- How many employees are in contact with customers on a daily basis in your organization?

Your customer support department must develop the relationships that create customer loyalty and generate repeat sales. Automated CRM provides customer support teams with the tools to:

- Increase call center efficiency
- Create cross-sell and up-sell opportunities
- Better manage interactions and call escalation
- Deliver higher levels of customer service

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Accounting Integration

With ACCPAC CRM, you can quickly analyze, manage and synchronize sales, marketing and customer care activities across all points of contacts,. Regardless of how, when or where your customers, partners and prospects choose to interact with your company, ACCPAC CRM gives you a decisive a advantage by providing comprehensive, easy-to-use tools to successfully manage these relationships.

And this means nothing if your CRM system is not tightly integrated with your accounting system!

Ask yourself the following questions:

- How are inaccuracies negatively impacting your organization?
- What information or reports are being requested that currently cannot be generated or delivered?
- Which reports are produced that include information that exists "somewhere" and needs to be manually completed?
- How can your current system integrated with your e-business initiatives?
- What information do you need to make strategic decisions?

Integrate the back-office

Direct your efforts toward integrating your new ACCPAC CRM system with your back-office accounting data. Most organizations want the ability to push transaction data from their accounting databases to their CRM system and vice versa. You will want to have this critical piece completed and tested before launching the CRM system.

Call WAC Consulting at 508.393.7731 to find out how a well-defined CRM system can give you significant competitive advantages or email Jamie Stonier at jsto@wacinc.com

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