

## Let's Not Get Crazy -- Basic CRM Most Popular

I'm going to tell you a secret. For all the coverage on the advanced tools that CRM can provide, most small and medium sized businesses are using their system for the most basic of tasks. And it's ok to do so.

The truth is that much of the value of CRM is derived from the basic tools listed on the chart below. Once you master these six areas, you can choose to get more value from marketing automation, service ticketing, returns and authorizations, and more. The list goes on and on for extra value that CRM can add to your business.



Certainly we'd like to see more people getting more value from advanced functionality, but most businesses enjoy these basic benefits and don't need more. Anyone hesitating to use CRM because they can't handle the complication, need only focus on these six areas to get real value almost immediately.

### 1.) Rolodex (Contact Management)

The most basic ability and usual starting point for small businesses. People get sick of digging through business cards, searching through drawers, or locating the right Post-It note to find a phone number or address.

Basic CRM provides a way to type in the name of a person or company and have all their information instantly appear on screen.

### 2.) Calendar

The next logical step is to begin setting up appointments with these contacts at a future date. CRM allows you to set up a meeting, follow up phone call, or reminder to send an email. That way you'll have less chance of missing a prospect meeting or following up with a prospect that asked you to call back.

At this point most, if not all, current versions of any CRM system have built in calendar integration with Outlook, Lotus Notes and other popular email and calendaring systems. That way you avoid double entry and you always are on top of your schedule.

### **3.) Notes and History**

So you put, in your calendar, a follow up phone call with a prospect a month later, but when the phone call occurs can you remember what you talked about last time? If you don't, you'll have to rehash all that you discussed the last time. You're wasting time and frustrating the prospect.

CRM allows you to record all those notes from the last conversation so that you'll know exactly what you discussed last month. With the email integration mentioned above, you also have any email interaction that occurred in the meantime.

### **4.) Mail Merge**

Now we're getting into more advanced tools. Using a mail merge allows you to customize an email or document based on the information within the system.

Let's say you want to send an email to 100 prospects and want it personalized so it addresses them specifically. A mail merge allows you to do that. You can also build things like quotes and proposals from the information within the system. Basically whatever you put in, you can get out in a personalized form, saving time and adding real value.

### **5.) Forecasting**

One of the more popular goals of CRM implementation is to gather an accurate forecast. You avoid having your sales staff give you inaccurate rough estimates of their upcoming sales. Instead you have everything recorded in the system. Realistically you're never going to get a 100% accurate forecasts, but our clients have all seen marked improvement.

The unintended benefit of tracking sales within the system is that it eliminates the need to compile all this data at the end of the year, quarter, or month, as most organizations do. We had one client, who had to compile a sales report every month to report on their activity, as well as closed and impending sales. Without CRM, the company shut down for the final three days of the month to compile the data. Now it takes five minutes to put together a report.

### **6.) Monitor Activities**

This goes hand in hand with the calendaring benefit that individuals enjoy. Employees find it easier to remember important engagements because they are entering meetings, phone calls, and to dos into the system. No longer are prospects and customer orders slipping through the cracks.

You also have the ability to track that data within the system. If you have a struggling sales person you'll have an easier time identifying the problem. Maybe she needs additional training because she is getting caught in certain phase of the process, or maybe he just needs to meet with more prospects. If your star sales person calls 40 prospects and meets with 10 and your laggard only calls 10 and meets with 2, it might just be a matter of encouraging more calls.

CRM may initially appear to be a complicated system and a task too big to take on. Successful companies disagree. Most people shun the complicated advanced features and focus on improving their business with the simple tools above. It's not wrong to keep the system simple, and in most cases it's the best strategy.