What is a CRM system?

Sales is all about moving an opportunity through a process that takes it from the first contact through to sale and beyond. A CRM (Customer Relationship Management) system will help you define, measure and manage this process.

A CRM system is a database that holds information about your customers, prospects, contacts, opportunities, sales and support issues. With most systems you can set the system up so that it matches your particular sales process or product, that is; you add or rename fields so that you can hold the data that defines your sales pipeline.

What are the benefits of using a CRM system?

A CRM system will increase your sales by:

- Helping you keep in regular contact with customers and prospects – reminding them of service anniversaries, informing them of new products and services
- Making sure you follow the sales process so that opportunities are followed-up and converted
- Helping you understand where leads and sales come from so that you can focus your marketing accordingly

How do you implement a CRM system?

CRM systems used to be hugely expensive and complex but with the advent of cloud computing they are affordable for even the smallest business

- First, write down your sales pipeline process – the steps that you go through from prospect to sale. An example might be: Prospect – opportunity – qualified opportunity – sales meeting – closed (won or lost). Document the number of each that are created each year
- Identify the information you need to understand and communicate with your customer. This will usually be basic contact information plus data specific to your business (for example car registration for a garage, or number of rooms for a carpet fitter). Include steps to gather this data in the above process
- Search online and select a system that can be set up to match your process and data needs. Other things to consider are the total number of records you will need to hold – many cloud systems are free for a small number of customer records but you need to plan for growth. A more sophisticated consideration is the other cloud-based systems the CRM will link to – often an accounts system, an email marketing system, a timesheet system and so forth. Most systems will also offer a free evaluation period
- Once you have selected the system, load sufficient data to test that the system will do what you need
- Successful full implementation will require you to change the way you work in order to get the full benefits. Make sure your sales, service, marketing and admin processes are changed to gather and use the new information