

# 10 THINGS TO CONSIDER IF YOU ARE THINKING ABOUT CRM

Customer Relationship Management (CRM) systems have been around for many years and have mainly been adopted by larger businesses. But many small or even micro- businesses (and third sector organisations) could benefit. So what do **you** need to consider? Set your own goals before you start – what will a successful CRM implementation look like in **your** business?

## 1. WHO?

Are you on your own or do you work with a team (this may be a team of associates in other organisations)? Then CRM could be the vital system linking you together with all relevant client information and making it consistent and accessible. If you work on your own, then CRM makes it easy to keep yourself organised!

## 2. WHERE?

Are you a traditional office-based business or is everyone highly mobile, working from anywhere? Make sure you think about “where” your CRM needs to be; on a server in your office, in the cloud, accessible via phones and tablets etc.. Consider whether you have access to high-speed broadband before opting for a cloud-based solution. (You should be able to trial a system before signing up).

## 3. WHY?

Why do you want CRM? Not a daft question – but think about what benefits you are looking for; will it save you time, help you close more deals, become more productive? Not just because your competitor has it! See above – what are your business goals? Decide how to measure return on investment, and get crystal clear on how the value will be delivered in your business.

## 4. SALES

CRM is often seen as a “Sales” tool (although there are many other ways to use it). Do you have a Sales team? No – not shiny guys in suits driving flash cars – your sales team may be anyone in your organisation who has contact with customers and prospects – how can they influence a sale? Make sure all interactions are recorded, and make it easy for your employees to give great service. Have standard templates for \*everything\* and make sure people use them.

## 5. MARKETING

Remember CRM is much more than a “glorified address book”. Take the time to think about all the other attributes of a customer that matter to you – industry sector, turnover, etc – and record them in your CRM. Now you have a marketing database that you can use for email marketing (much more effectively than the newsletter list to 5000 generic contacts), telemarketing or direct mail.

## 6. CUSTOMER SERVICE

Ok so you have acquired a customer – how do you keep them? Use your CRM to keep in touch with existing customers by delivering information or handy hints, and use it to track customer service issues to make sure the customer is kept happy.

## 7. TRAINING

Are you prepared to invest in training? It's scary how much time (and therefore money) you can waste when users don't know what they're doing. Scrimping on training is a Bad Idea and will cost you money in the long run. Set aside time and budget to ensure all users are working effectively and that you are getting a return on your investment.

## 8. THIRD SECTOR

If you are a charity or a social enterprise, then there are still reasons to use CRM – it might be recording donor information or tracking members of your organisation? There are lots of ways to use CRM in a third sector organisation.

## 9. TIME

Do not underestimate the amount of time it will take to set your system up properly, and the time you will need to spend keeping the system up to date – that is not to say that it should rule your life, or become a burden on the business – but if you spend a little time each day checking off tasks, and updating phone numbers when you need to then it will pay dividends in the long run.

## 10. NEXT STEPS

There are many "CRMs" – although all CRM systems work on similar principles, they can vary widely – as can the costs!! Take some time and ask lots of questions – ask the software vendor, consultants and / or business contacts who have had good (or not so good) experiences. But keep in mind your own goals for your business which may not align with others'.

## 11. THE BENEFIT

But I said there would only be 10!... CRM can be a fantastic asset for your business – if you plan it, invest in it and use it effectively. But it won't happen if you don't take the plunge – ask yourself where you would like to be in 6 months, 12 months or two years' time – what does that look like? If you are serious about growing your business, you really can't put off this decision a moment longer!

Contact us if you want to discuss in more detail!

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