The Insider Guide to Success with CRM

All you need to know to achieve exceptional CRM results
Having a successful Customer Relationship Management (CRM) system in place - one that addresses your business needs, serves your customers, and is fully adopted by your employees - is a high-stakes operation.

The right solution, careful planning, ongoing commitment and choosing the right partner can bring it all together.

This eBook features content from our most popular blog posts covering CRM advice, best practices and successful strategies that are designed to help you make the best decisions for your business.

As a Microsoft partner, Preact implements and supports Dynamics 365. If you are considering Dynamics 365, or if you are already getting started with a new CRM solution we hope you find this document useful.

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How to Define your CRM Vision & Goals

Before implementing a new system, first define your CRM vision.

What Is Your Organisation’s CRM Vision?

Your business might be facing some of these issues:

- Unable to measure the value of each client account and personalise service accordingly
- Lack of insight across key performance indicators
- Struggling to achieve a balance between improving customer experience and controlling service costs
- Needing to improve customer acquisition and retention rates

At the outset, a clear CRM vision should be defined that states where your business wants to be.

Think of your CRM vision statement as a 30-second pitch for your project that sums up its purpose and critical aspects in just one or two sentences.

By defining and documenting this vision you will have a destination and reference point throughout the project to steer decisions and additional requirements.

Defining your CRM vision is a team effort, this will often reflect:

- The future direction of your business, perhaps a 3-5 year plan
- Where you are now, and current market demand
- Your values - guiding principles of why you are in business, and what sets you apart from competitors
- Your company mission
- Who you want to do business with
- The standards, benchmarks and other criteria that you use to measure success

Example CRM Vision Statements

- “Build and develop long-term client relationships by creating personalized experiences across all touch-points, and by anticipating customer needs and providing customized offers.”
- “To implement a consistent methodology across all of our sales teams that encourages consultative selling with a systematic method to qualify opportunities that is readily accessible to regional sales teams.”
- “Create a hub for a complete, uniform and robust view of our interactions to ensure that our staff have the correct information at their fingertips when dealing with customers and prospects.”
- “Build and maintain long-term relationships by creating personalised experiences for our members, through a greater understanding of their needs, expectations and interests.”
In addition to the goals of an executive team, the CRM vision statement should span departments within an organisation. As a result, there will be a variety of goals across these groups.

The goals of the organisation's executives will frequently include:

- Identifying the most valuable accounts
- Increasing the volume of new sales opportunities
- Understanding the ROI from email marketing
- Reducing operating costs
- Accurately measuring customer satisfaction

Focusing on the goals of individual managers, these may include:

- Understanding why deals are won or lost
- Clearer visibility into the sales pipeline
- Ensuring Service Level Agreements are met
- On-demand management reporting
- Being able to quickly create targeted marketing lists
- Replacing time-consuming manual workflows

For end users, goals that support the CRM vision often include:

- Online and offline access to customer, sales and process information
- Single source of information about customers, members, prospects & other contacts
- Getting credit for work delivered
- Reducing administration and repetitive manual tasks
- Understanding which client service issues need to be resolved
- Which sales opportunities need immediate attention

Consider Your Goals, And How You Will Use CRM To Measure These

It is critical that senior executives are involved in defining this vision, that you document the vision, and that it is understood by and communicated to everyone.
How Will CRM Remove Processing Pain?

To achieve CRM project goals and support growth plans, there is often a priority need for CRM technology to help businesses overcome processing pain.

This may be due to data being held in unconnected apps and data silos which causes duplication of effort and time-consuming manual tasks. In other instances, processes are handled haphazardly with an inconsistent approach that results in unpredictable service delivery and poor quality data.

Implementing a new CRM system will be a catalyst to re-engineer these processes and make them smarter by reducing the resources involved to achieve greater scale, and ultimately lower the cost of getting things done.

Which of your workflows are in need of most attention? What processing pain-points do you most want to overcome?

Once your CRM goals are defined, involve stakeholders and an implementation partner to progress your project by covering these:

What Businesses Processes Do You Need To Manage?

CRM technology will manage relationships with people and businesses, and track associated activities but what additional processes do you need to manage?

Most systems have inbuilt capabilities for managing sales leads and service cases, while the breadth of Microsoft Dynamics 365 apps include project tasks and field service work orders. Depending on the nature of your business, further process types may need to be managed that will require a custom entity.

Examples of custom CRM entities from projects that Preact has delivered include: applications, jobs, property, equipment, medical records, and even puppy dogs!

What critical businesses processes do you need to manage in CRM solution now, and in the future?

Identifying what needs to be managed will simplify the choice in finding the best technology that has the capabilities and flexibility to fit your immediate and long term needs.

will At the outset, you decide at the outset how many CRM hours are loaded into the managed agreement which sets a predictable monthly price. This can be as little as one hour a month (12 CRM hours annually), or choose 25 or more hours a month for the sufficient consultancy, training and
What Must Be Achieved In The Initial Implementation?

Will the CRM implementation be a major project that is released throughout the entire business from the outset?

Or, rather than a 'big bang' project, will this be implemented in a phased approach that initially deals with priority requirements for one or two teams?

There are many merits in first launching CRM with a limited rollout that will minimise disruption and achieve quick wins. However, due to the complexity of some requirements this approach is not always realistic. In these instances, the project will be subject to a detailed scoping process and the system will be developed over several weeks or months before a ‘go-live’ date.

Define precisely what needs to be addressed in the first CRM build. What is absolutely essential? Which items are preferred, or ‘nice to have’ features that could potentially be picked up in a later phase?

Clearly, these questions will need to be answered in the context of your timescales and budget.

Cloud CRM Or On-Premise?

The majority of CRM implementations for small and mid-sized business are now deployed in the cloud.

If you have previously had an on-premise system, will a cloud service be more cost effective?

Few providers offer both on-premise and cloud CRM solutions. For instances when an on-premise system is sought, engage with a partner to understand the roadmap and release cadence for the prospective solution.

What Applications & Services Need To Be Integrated With CRM?

Beyond Microsoft Office apps, what technology and data sources will CRM need to connect with?

This could include your website to import new enquiries and leads, ERP or accounting software to automate order processing, an ecommerce platform to import transactional data, or a marketing automation service to align email marketing processes.

These are just some of the many examples of CRM integration. What integrations do you need, and how will these be achieved? Engage with a CRM partner to understand how they have previously completed similar requirements.
Show People The Direct Benefit Of CRM

Don’t assume that colleagues will have the same passion for making your business processes more cost effective as you. Using the example of a sales team, their main concern will be their sales commission. Sales users must be made aware of the benefits of CRM, not just to the company, but what is in it for them personally (see page 23). Demonstrate how CRM will make their working life easier.

Build a Strong Project Team

- An **Executive Sponsor** who lends their influence to the project by becoming its champion at board or senior management level. Their support and participation from CRM planning to ‘go-live’ and beyond is critical.
- An **Internal Project Manager** who understands your business’s process to internally lead your project.
- At least one person will be designated as a **CRM Administrator** to manage the system. This individual(s) will ideally be technical and well organized as they will be responsible for adding users, managing security roles, importing data and providing front-line user support.

Create a Training Plan

Teams will quickly fall back into old ways of finding information in legacy systems and using manual processes unless CRM adoption is reinforced.

Staff cannot be expected to be highly proficient users after just a single training session. Considering a leading package, Microsoft Dynamics 365, this is intuitive to use but contains advanced functions that require more detailed tuition which is customised to an individual’s role within the organisation.

Demonstrate the importance of developing user and administrator skills by developing training plans for individual roles that support continued learning and create CRM advocates. Provide plenty of notice for training and deliver this in an environment that is free of interruptions.
A Concise Guide to CRM Leadership

Communicate CRM Isn’t Optional

Your business has invested time and budget in CRM. Usage is not optional, and nor is failure.

CRM will likely prove disruptive to settled practices but if these were fully efficient there wouldn’t be any need to implement a new solution. Communicate that this initiative is not business as usual and CRM will not be pushed aside.

Use CRM Data In Meetings

CRM helps people prepare for meetings and be more informed, whether they are a leader or participant. Quote CRM data and use these metrics as the basis for reporting, discussion and celebrating goals being achieved to demonstrate that CRM is the single source of truth.

For example, a service team leader can share CRM data to report how many cases were logged last month, commend the individuals who resolved most issues and pinpoint which types of service issues are consuming the most time.

Start With Priority Teams

Where will CRM have the most impact in your business?

A phased implementation begins with one or two teams where the biggest gains can quickly be achieved to avoid the expense of a long drawn out project. Success will breed success driving widespread user empowerment which creates a clear justification for deploying CRM to more business units.

Strive For Integration

Doing the same thing in different systems is a productivity killer. Successful CRM strategies align processes so these can be managed through a single interface. Leaders should continually look to identify and eliminate duplication of effort by integrating processes with CRM.

In some instances, CRM can replace legacy spread-sheets and applications while in other cases CRM will integrate with specialist systems and services including ERP and marketing automation platforms.

A fully integrated CRM solution gives teams more time to do their job, improves efficiency and avoids users regarding CRM as yet another disconnected system that needs to be updated.
Embrace CRM Change

Your business doesn’t remain unchanged and neither should your CRM system.

A healthy sign is when individuals request changes as they become more proficient users. If teams aren’t pushing for CRM change, they are unlikely to be getting any tangible value from it.

CRM is not ‘fit & forget’ system. It needs to be considered in virtually every decision that a company makes.

Effective CRM strategies continually evolve. After deployment, invite user suggestions and evaluate requests on a recurring basis with the objective of making further improvements to its effectiveness (see page 27).

Not every user request can be actioned immediately, and some ideas may be impractical, but this is an example where leaders must manage expectations and communicate why certain requests cannot be progressed.

To maintain momentum, your business partner and CRM administrator should be responsive to make sure that approved change requests are implemented in a timely manner.

In addition to user requests, CRM change will result from acquisition / mergers, adding new services / products, expansion into new territories and other milestone events.

Change will also come from new CRM releases. Monitor updates to understand and communicate which new features will have the most beneficial impact, and determine how these can be best configured.

In larger organisations, a ‘steering group’ will often be assembled to run CRM. They will have representation at board level and meet regularly to discuss, plan and implement CRM change in a controlled manner. For smaller businesses it will often be just one or two individuals that assume ownership and the co-ordination of CRM with business goals.

Get Competitive!

Unleash your team’s competitive spirit to increase productivity and boost user engagement with CRM gamification features.

Use the concept of fantasy sports games to award points for any action captured in CRM, for example closing a support case, creating a sales opportunity or adding a knowledge article. Users can participate in individual and team-based fantasy competitions that will motivate them to achieve pre-defined KPI’s by offering prizes, awards, privileges and recognition.

Split users into two or more fantasy teams, each member is automatically awarded points for positive CRM actions to develop a creative and informal approach for embedding CRM within a team and improving performance.

- See more at: https://www.preact.co.uk/blog/a-compact-guide-to-crm-leadership#sthash.99irfPET.dpuf

CRM Means Collaboration

Finally, never lose sight of the fact that CRM should foster collaboration to improve your processes and provide a better service to your customers.
How to Avoid These CRM Pitfalls

Inadequate planning is a frequent reason why CRM projects fail to deliver their expected results. Here are 5 recommendations to keep you on track.

Don’t Be Too Ambitious

Large-scale projects often struggle to progress due to the resources they consume, and the disruption caused.

Start by prioritising requirements and defining the investment needed to achieve expectations - short cuts in the planning phase can have far-reaching consequences. Consider introducing a CRM solution to one or two departments before embarking on a broader roll out.

As we’ve already highlighted, through careful prioritizing, project leaders can focus on the teams and processes where CRM will have the most significant impact - and where it will have the highest adoption.

With a manageable initial phase, streamlined CRM projects can be more easily budgeted and get underway quickly. This will generate early results that instil confidence and build a solid foundation for widespread use.

Secure Buy-In From Teams & Managers

Successful CRM systems are fully adopted throughout a business so it’s vital that the people who participate in the decision making process are visibly committed to the project.

Marketing teams often drive the demand for CRM but ultimate success is frequently determined by its acceptance and adoption by sales people. Their requirements should be heard at an early stage.

Senior managers have the most to gain from CRM success through better reporting, process efficiencies and increased customer retention. As a result, they should be fully on-board and accountable from the start when the case for CRM is built.

After consulting teams, some requirements may be in conflict with the result of delays and increased cost. Difficult decisions may need to be taken and must be made with accountability from senior managers.

Researcching CRM Solutions

It can be tempting to ‘go with what you know’ and implement a CRM system that you have previously worked with. However, what worked successfully before might not be so effective in a different environment, with a different set of challenges to overcome.

Consider what processes can be natively handled, how prospective solutions will work with your existing apps, how each system is licensed, how data will be protected and the manufacturers roadmap for the product.
Think Beyond The Technology

CRM is a business strategy supported by processes and technology that is used by teams.

In some instances organisations will focus heavily on the technology to the detriment of considering how their processes will be mapped across, or implementing a strategy that will gain user adoption. For CRM technology to be relevant, the application must be personalised to fit bespoke processes and the needs of the people who will use it.

The level of personalisation will depend on your own workflows and the capabilities of the solution you are implementing. Even a basic implementation should reflect your unique terminology and processes.

Although teams may have been consulted during the planning process don’t expect them to automatically use system effectively. The goodwill created through consultation will soon evaporate if people don’t understand how to use the technology.

User training must be built into any CRM project. As well as covering tuition on application functions, group training is the perfect forum to formulate processes and gain collective buy-in.

Determining which implementation path to follow is a challenging part of any CRM project. Assistance is available from specialists like Preact which can include scoping and project planning your rollout.
5 Examples of CRM Success

The criteria for CRM success may vary but regardless of industry sector and size there are consistent actions that point the way towards goals being achieved. When these coincide, it creates an environment in which CRM will thrive.

Do Business Anywhere

CRM systems are designed to be an enabler that make individuals productive wherever they work.

Remote and mobile workers should have access to the same data and tools they need to do their job compared to if they are working in the office.

Through mobile apps and offline working, CRM should be implemented to give users on-demand access to all the relationship data and business processes that matter to them.

This can include referencing data directly from CRM during a client meeting, catching up on tasks between meetings, sending a revised sales proposal on a train, checking work order detail while carrying out an on-site job, or responding to a service case when working from home.

Whatever the scenario, having immediate CRM access, regardless of location, will make a tangible improvement to productivity throughout an organisation.
Create Smarter Business Processes

Removing duplication of effort is an obvious CRM requirement but developing smarter processes involves more than just replacing manual tasks with automated workflows.

In mapping an organisation’s business processes to a new CRM system there will inevitably be some trade off.

In the first instance, CRM must reflect your workflows. If you track customer service cases, projects, events, training courses, applications and other specific processes you absolutely need a system that will manage these processes and mirror your methodology.

However, a new CRM system will have inbuilt functions that can make a direct improvement to the efficiency of these processes.

Implementing a new application, or reviewing an existing solution, is an excellent opportunity to identify how these capabilities can be configured to improve process efficiency.

This will be most powerful when focused on everyday repeatable workflows.

When it comes to improving business processes through CRM, the direct benefits include reducing resource consumption, better data quality and enforcing greater consistency. Process automation is just one aspect of this.

Examples of CRM Driven Processes

Connecting Accounting / ERP systems to process sales order information enabling invoices to be raised without re-keying data.

Guided lead qualification processes that prompt users to ask questions, collect data and qualify prospects in line with agreed rules and best practice. By understanding what has happened, and what needs to be done next on each task, CRM guides users towards positive outcomes.

Integrating email marketing that updates CRM with recipient actions. On a simple level track open and click data, and apply opt-out requests. Advanced uses include using CRM data to drive dynamic content that increases recipient engagement, or use CRM events including field changes to trigger automated campaigns that send a sequence of contextual emails (see page 25).
Transform Service Delivery

Developing smarter processes and empowering everyone to be responsible for customer service, wherever they work, are two vital steps towards better service delivery.

A prime objective for any CRM initiative should be to create a single relationship view that represents ‘one truth’ about each customer which is accessible across multiple platforms. As a result, financial data, essential contact information and a communications history will be accessible in one place.

By relying on a single customer view, time and resources are better applied to service customers and use what is known about each relationship to provide a personalised service.

This avoids customers being asked to repeat themselves because previously shared information is easily accessible. A more strategic benefit is to use CRM data to anticipate customer requirements and promote products or services in an account review or a marketing campaign.

Basic CRM systems often lack case management functions. An important action to transform service delivery is to put better tools into the hands of customer facing staff to help them manage support issues, resolve service requests and respond to complaints. By combining guided case management processes with complete relationship detail, service agents will reach successful outcomes on a consistent basis.

A CRM strategy should recognize that customers demand the flexibility to choose which channels they interact with organisations across.

Many customers prefer to avoid call centres. Through CRM integrated web portals they can transact with an organisation on their own terms to find answers which deflects service calls and increases satisfaction levels.

Another example is to connect social media channels with CRM. For example, Microsoft Social Engagement highlights actionable social posts where information requests, service issues and complaints are identified. These can be routed to CRM and resolved using the same interface compared to similar issues reported by phone or email.

Finally, various survey tools can be built into these processes to capture timely customer feedback and opinions that will drive further service improvements.
Discover Actionable Data Insights

Consolidating data about your customers and processes in one place is an important step but the greatest value will be in how this data is used, and the insights gained.

Having more data is not necessarily the objective but having it centralised and connected is crucial for uncovering new insights about the business and recent performance.

When business data is fragmented even basic reporting tends to be time consuming and decisions are often based on considerable guesswork. As well as being resource intensive, manual reports are liable to errors and inconsistencies. Due to these shortcomings, reports may be lacking depth which limits their value.

Delays, inaccuracies and limited detail are a toxic combination for informed and nimble decision making.

Once customer and process data is unified, reports and dashboards are needed to track key performance indicators and focus on the metrics that matter most to you.

Rather than sifting through long report tables, by using an integrated graphical reporting tool such as Power BI, individuals and teams can quickly visualize their data through graphic dashboards and charts. These enable trends to be identified and performance to be clearly understood.

The result is new insights from reports and dashboards which never previously seemed possible. These are then used as the basis for data-driven decision making.
Rapid CRM user adoption in isolation does not guarantee success.

Users expect the technology to allow them to do business anywhere on their terms and enable them to develop better connected business processes that remove duplicated effort. This will include connecting all customer data to a single hub that empowers everyone to deliver service that wows customers and provides actionable new insights.
How to Engage CRM Users

Poor user adoption is a significant factor why CRM projects fail to deliver their expected results. Secure user buy-in with these proven steps.

Show Users The Direct Benefit of CRM

Faced with a new CRM system employees will want to know “What is in it for me?”. Demonstrate how CRM will benefit individuals and teams, and show them how it will help in their day to day work to dispel any concerns that CRM is simply a tool designed to keep any eye on them.

Involve Users

Adoption will always be improved if end users have a voice in the CRM planning process. With an early stake in the project, users will be more motivated to invest time and make an extra effort in making CRM a success.

Deliver Content Rich Training

A quick walk-through demonstration isn’t sufficient for new users. Devise a training plan that includes introductory training to cover the essentials and role specific tuition to ensure that sales, marketing and service teams can begin using CRM with understanding and confidence.

The timeline for each training plan should run well beyond the initial implementation. As users become more proficient they will want to understand more advanced functions and processes. By partnering with a CRM specialist, on-demand tuition can be scheduled that enables users to continually improve skills and gain familiarity with new processes (see page 27).

Recruit CRM Advocates

Reach out to enthusiastic and influential individuals who will evangelise CRM. They will help secure user buy-in and provide rock-solid support when challenges arise.

Personalise CRM

From the outset, your CRM database should be personalised to match your business processes if it is to pass the crucial test of user relevancy. For example, field titles, workflows and reports should all be adapted to fit the way you work.

Keep It Simple

CRM systems have numerous features but do users need them all right now?

Users hate interfaces cluttered with irrelevant features which creates an immediate barrier to adoption. Personalise the CRM layout for a clean interface that reflects only the processes that users currently need. More functions can always be switched on later when they are needed.
How to Engage CRM Users

Communicate Openly Between Teams
Successful CRM isn’t a single department solution. By connecting teams to a centralised data source, processes can be integrated but good communication remains essential to ensure that information flows smoothly throughout the organisation and duplication is avoided.

For example, CRM can be configured to automatically score leads but are sales and marketing teams on the same page when it comes to defining what a ‘sales ready’ lead looks like?

Optimise For Mobile
Users demand mobile accessibility to business data so your CRM system must be easily available across multiple devices. Furthermore, this interface should be optimised for mobile and tablets that features sliders, switches, dials and other mobile friendly controls that will enhance the user experience.

Replicate Social Controls
CRM will always be more relevant if users can apply functions which they are already familiar with. Increasingly this includes social tools so it may be beneficial to choose a CRM solution that enables users to ‘follow’ accounts, sales opportunities and other records to receive alerts when important actions occur, and share entries that promote better team collaboration.

Visible Executive Support
Users will want to see if the people who promoted the system are serious about it and CRM isn’t just a passing fad. Directors and senior managers who have much to gain from CRM will need to set an example by talking about CRM, promoting CRM and most importantly, using it.

Friendly Competition
Reward the most engaged users by using CRM metrics to create healthy competition and instil acceptance. For example, celebrate who closed the most service cases, who converted the highest number of leads or who completed the most outbound calls - as reported in CRM.
How to Engage CRM Users

Cleanse Data Before You Start

Begin using your new CRM system with quality data from the outset. Before migrating legacy records, purge duplicates and outdated contacts to create user confidence in the data they are working with.

Appoint a CRM Champion

Designate an internal CRM champion who will assist with internal training and be the ‘go-to’ person to resolve issues and manage user requests.

Small Footsteps

As well as lowering the upfront expense of CRM, an initially small scale implementation will help individuals build confidence using the application.

A phased implementation is a popular strategy as it enables new users to master the basics without feeling overwhelmed by a project that attempts to achieve too much, too quickly.

Utilise Familiar Apps & Services

CRM is more relevant to users when it works with familiar applications. This can include Outlook, an accounts database, email marketing services, Skype, Microsoft Excel and Sharepoint.

Choose a CRM system that works with the apps and solutions which your team already enjoy working with, and make sure that CRM integration is included in your implementation plan, even if it’s not part of the initial deployment.
How to Engage CRM Users

Seek Feedback
Keep the lines of communication open following the initial CRM training and encourage users to share their experiences and recommendations. Use this feedback as the basis for making modifications in future CRM updates that will strengthen the relationship with users.

Keep CRM Issues Open & Public
Despite your best efforts some CRM sceptics may be evident. Getting these individuals to express their points openly is vital, if left unchecked they can spread dissent and prove a negative influence.
Tackle genuine CRM issues directly so others can assess their validity, limiting any damage to user adoption or motivation.

Future Proof CRM
User adoption will suffer if the application doesn’t keep pace with new requirements and future change.
It may not be possible to forecast all your future needs but assess how scalable prospective platforms will be to accommodate further customisation and integration.
Also, check how much development budget the manufacturer is investing in its development.

Keep Everything In CRM
If individuals are still allowed to hold their own data sources CRM will never fulfil its full potential.
CRM is all about sharing and increasing the visibility of customer relationships. The more people who contribute information to this shared system, the more value will result for everyone.
Using CRM to Improve Customer Retention

With the total cost of acquiring new business many times higher than servicing existing clients, customer retention is frequently at the heart of many CRM strategies. These examples demonstrate how organisations use CRM technology to keep their clients loyal and coming back for more.

Proactively Keeping In Touch

- Avoid neglecting customers by applying automated CRM processes that alert account owners if no recent activity is detected. Embedded artificial intelligence capabilities deliver further notifications to identify accounts at risk.
- Connect CRM with marketing automation to send personalised messages that communicate news, offers and events. Use integrated email reporting to assess interest and initiate increasingly targeted communications (see page 25).
- Increase email engagement using CRM data to personalise messages with dynamic content. This can reflect individual recipient actions, known preferences and other detail that will make each message resonate.
- Track expiry dates, membership information and other time sensitive detail to coordinate activities and emails around these dates to boost renewal rates. For example, configure a series of nurture emails several months prior to the anniversary of a service agreement that will send a sequence of messages promoting this service.
- Schedule simple reminder activities that prompt follow-up action.

Increasing Account Value

- Profile records enabling everyone to see the clear value of each account. For example, create a field that shows the account profitability, highlight important client reference sites and show the total spend within the last 12 months.
- Connect CRM with an accounting or ERP system. As well as improving order processing and eliminating double-entry, customer facing staff can easily check the order history on each account to anticipate future requirements and make recommendations to cross-sell opportunities that will increase account revenue.
- Identify dormant customers and re-engage these individuals with compelling offers. Reminding them of your services, understanding why they haven’t recently transacted with you, and communicating that you still value them can often result in immediate opportunities and improved client relations.
Using CRM to Improve Customer Retention

Deliver Amazing Service

- Empower everyone to access CRM data wherever they work so they can use complete relationship detail to deliver a personalised service that competitors will struggle to match.
- Use case management tools to track customer issues for clear visibility of outstanding service items. Utilise knowledge management, case routing and queue functionality to transform service delivery.
- Keep clients updated with progress on their support tickets through automated email notifications when cases are opened, updated and closed.
- Publish self-service web portals enabling clients to do business with you on their own terms, even when your office is closed. Find answers, create service requests, check case statuses and update CRM data online at any time.
- Use CRM to enforce service level agreements that prioritise customer issues and protect the most valuable accounts by triggering automated alerts if SLA terms are at risk of being breached.
- Develop guided CRM processes that direct users to successful outcomes in line with your rules and methodology. For example, create guided business flows that help service agents qualify support requests by prompting them to ask questions and take consistent action in line with defined process logic.
- Track social conversations to measure sentiment towards your organisation and brand, and leverage CRM integration to react with agility when service issues are detected, or where selling opportunities are identified.

Reviewing Service Performance

- Capture customer feedback in CRM. For example, include a link to a survey form in an automated email when a support ticket is closed, or when a contact attends a training course. Use feedback reports to assess performance and take corrective action if problems occur.
- Use CRM dashboards to review recent service performance and identify areas for improvement. This could include using metrics to pinpoint recurring problems, and assessing how many issues are being resolved in a single call.
- Use reporting and gamification features to develop staff incentive schemes that reward users for outstanding performance in key metrics. This could be based on the number of cases closed per week / month or the highest scoring customer feedback.
**How Sales Teams Benefit from CRM**

Sales teams are an obvious focus for CRM projects. Success will depend on how well these individuals engage with a new system, and how they perceive they will personally benefit from CRM.

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**Goal Management**

Sales teams and individuals need to know how they are performing in comparison to their sales goals. Are they on track? If not, how much is the shortfall?

CRM technology such as Microsoft Dynamics 365 tracks activity and benchmarks this against key sales performance indicators.

With easy to follow real-time charts and reports, sales managers and other professionals are always kept up to date.

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**Improved Lead Qualification**

With guided processes, telemarketers are prompted to ask the right questions and gather information to identify and qualify sales opportunities.

This removes inconsistencies and helps to keep everyone on the same page when it comes to defining a good opportunity.

By following these defined steps, there is predictability in the quality of opportunities passed across to sales teams to sustain desired conversion rates.

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**Understand Which Leads Convert Best**

CRM technology maintains lead intelligence that helps sales and marketing teams identify which lead sources create the most valuable opportunities, and which result in the best conversion rate.

With the benefit of this insight, teams can prioritise activities and focus budgets on the most profitable sources.
How Sales Teams Benefit from CRM

**Increasing Account Values**
By connecting all customer data and interactions to a centralised CRM system, account managers are connected to a single source of truth about each relationship.

Using this insight, account managers are well prepared to have productive engagements, identify new sales opportunities and increase the value of their client relationships.

**Automated Lead Nurturing**
Nurture programs keep your messaging in front of prospects who aren’t yet ready to buy - without over committing sales resources.

Email campaigns can be configured in CRM to nurture prospects who aren’t yet ‘sales ready’. They will receive drip-fed personalised emails over several weeks or months that will trigger further actions when individuals react to your calls to action.

**Sales Mobility**
There can often be a communications gap between field and office based sales staff due to a lack of shared information.

Mobile CRM apps empower sales staff to access their opportunities, customers, activities and other sales data wherever they go. Get as much done outside the office, as inside, by using CRM on a tablet or mobile device.

**Increases Win Rate**
If you have a sales cycle lasting a few weeks that involves just a couple of sales steps, or a complex series of stages that span several months, CRM will track each opportunity through your milestones.

Guided process flows reflect your businesses rules, methodology and best practice enabling sales users to identify what needs to happen next to reach a positive outcome. This is supported by competitor tracking, stakeholder analysis and embedded quoting capabilities to help sales users win more business.

**Creates More Selling Time**
CRM systems liberate teams from the burden of admin tasks and frees them to focus efforts on winning sales.

Real-time forecasts and sales statistics create insight into projected performance enabling teams to focus efforts on taking action rather than compiling reports.

Automated email notifications, embedded AI alert cards and connected business processes provide extra assistance that helps sales professionals make best use of their time on revenue generating activity.
Improves Collaboration Between Sales & Marketing

Tracking each email recipient action in CRM enables personalised views to be created that list the most engaged contacts in response to one, or more campaigns.

Weighted scores can be automatically applied that will rank the most active contacts. These views can be shared between sales and marketing teams to direct telemarketing activities, identify ‘sales ready’ prospects and enable account managers to identify potential interests or opportunities directly from their clients email actions.
Why Integrated Email Marketing & CRM Matters

**Understand Each Relationship**
Configure integrated web forms and encourage recipients to share more detail about themselves. This will improve your understanding about each relationship and use this insight to effectively personalise marketing messages.

Integrated web forms can be used to capture subscription preferences and enable email recipients to directly update this data in CRM that will increase the relevancy of marketing messages.

**Data Privacy Compliance**
Integrated email marketing ensures that each subscribe and unsubscribe instruction is automatically applied and tracked in CRM to support compliance with privacy legislation including GDPR.

Supporting functions include double opt-in processes, and automated unsubscribe suppression. Each opt-in/out action is date and time-stamped and data is protected by advanced role-based security permissions.

**CRM Triggered Emails**
Send personalised and timely messages by triggering email campaigns directly from CRM actions.

Record creation, changing a field or reaching a defined process stage are examples of some triggers to automatically send a single message, or a sequence of emails.

Examples can include lead nurturing campaigns, feedback surveys and emailing case notifications.

**Improve List Quality**
Create targeted CRM marketing lists and use data from previous email campaigns to assess the list quality.

Using embedded analytics, the engagement of each marketing list member can be visualised including how recently they opened or clicked a previous email.

Using this insight, action can be taken to exclude unresponsive recipients, or re-engage individuals to improve campaign metrics and support compliance with General Data Protection Regulation (GDPR).

**Increase Click Through Rates**
Use CRM data to adapt email content to audience members based on what you know about them to drive increased email clicks.

Any contact data including gender, location, age group, job title, hobbies and products ordered can be used as the basis for dynamic email content.

This enables highly personalised messages to be sent that will result in excellent recipient engagement and impressive campaign metrics.
CRM Evolution: How to Manage it

“"You are never done with CRM. Things are constantly evolving.”
Gartner Research

Often, a phased approach to CRM is taken with an initial implementation rolled out to one or two teams that focuses on priority issues.

As well as providing a faster route to early results, this strategy minimises upfront costs and avoids the distraction of a long drawn out project that takes people away from their regular activities. Once early wins are secured, attention can focus on the next steps to extend the system.

As CRM becomes more embedded in an organisation’s culture and its processes, and teams become increasingly proficient users, new requirements will be identified to increase its scale. This puts pressure on CRM administrators to action these requests promptly but due to other demands on their time, delays may result before these requests can be actioned.

If users experience a long wait, their engagement and goodwill towards the project will be at risk.

A managed service recognises that CRM is never done. It will continually evolve in response to changing needs and technology.

Preact’s managed agreement includes a bank of hours that can be allocated on-demand to instruct our team of CRM experts to implement user requests. These tasks can include applying Dynamics 365 customisations and configuring new processes that will improve the benefits of the system.

These resources can also be used to schedule training that will sharpen user skills and help everyone do more with the application.

Reflecting on Preact’s managed service for Microsoft Dynamics 365, here are 5 examples to demonstrate its value:

Help With All CRM Needs

In comparison to break / fix support, a managed service covers in depth help and consultancy across all CRM related requirements.

This includes training, configuring new functions, integration work, creating new automated processes, or delivering the next implementation stage.

Schedule Tasks On-Demand

Allocate managed service hours when new requirements occur by delegating scheduled tasks for external technicians and trainers to complete.

Hours are loaded into each agreement enabling CRM work to be immediately booked in which avoids the need to get budget approval for each new request.
Adapts to Fit Budgets & Priorities

At the outset, you decide how many CRM hours are included in an annual managed agreement which sets a predictable monthly price.

This can be as little as one hour a month (12 CRM hours annually), or as many as 25+ hours per month for the sufficient resources that you need to achieve your CRM goals.

Phase CRM Implementations

Schedule CRM tasks over several months to phase implementations and minimise interruption.

Solutions such as Microsoft Dynamics 365 are vast and only so much can be consumed in a single deployment. Managed agreement hours can be allocated on a rolling basis to carry out further project work that will utilise wider CRM functions. For example, this could include email marketing, field service automation, case management, project management, CRM web portal deployment and integration with external data sources that will increase its benefits.

Technical Account Manager

In many instances, a named CRM technician will be responsible for managing a managed service account. This individual will oversee all work carried out and they will be in frequent contact to discuss recent activities and share recommendations for additional work.

With access to a consistent contact who understands this unique CRM configuration, new requirements, questions and issues will be efficiently handled.
About Preact

Preact is a leading Customer Relationship Management consultancy, helping small and mid-market businesses maximise the value of their CRM strategy.

Established in 1993, we have evolved as the CRM landscape has changed and as a prominent Microsoft partner we lead with Dynamics 365.

At the heart of Preact’s culture sit our core values: Putting Customer’s First, Being The Best and Growing Business Together. Our commitment to living these values is central to the way we behave with our customers and each other. We are in business to help every organisation achieve outstanding success from their CRM solution, and deliver excellent value for money.

Our team will help you get started - or plan the next phase of your Microsoft Dynamics 365 implementation - broaden user skills, answer your support questions and assist you in leveraging maximum value from your investment in CRM.

Give us a call: 0800 381 1000 or +44(0)1628 661 810