

# THE BRIT AGENCY

> BRILLIANT INBOUND MARKETING

## A Beginner's Guide To Using A B2B Sales CRM

CRM or, “Customer Relationship Management” can sound intimidating to small and mid-sized businesses. In this guide we will look at what a CRM is and how your sales teams can benefit from implementing a CRM.



# What's Inside!

1. What is a CRM?

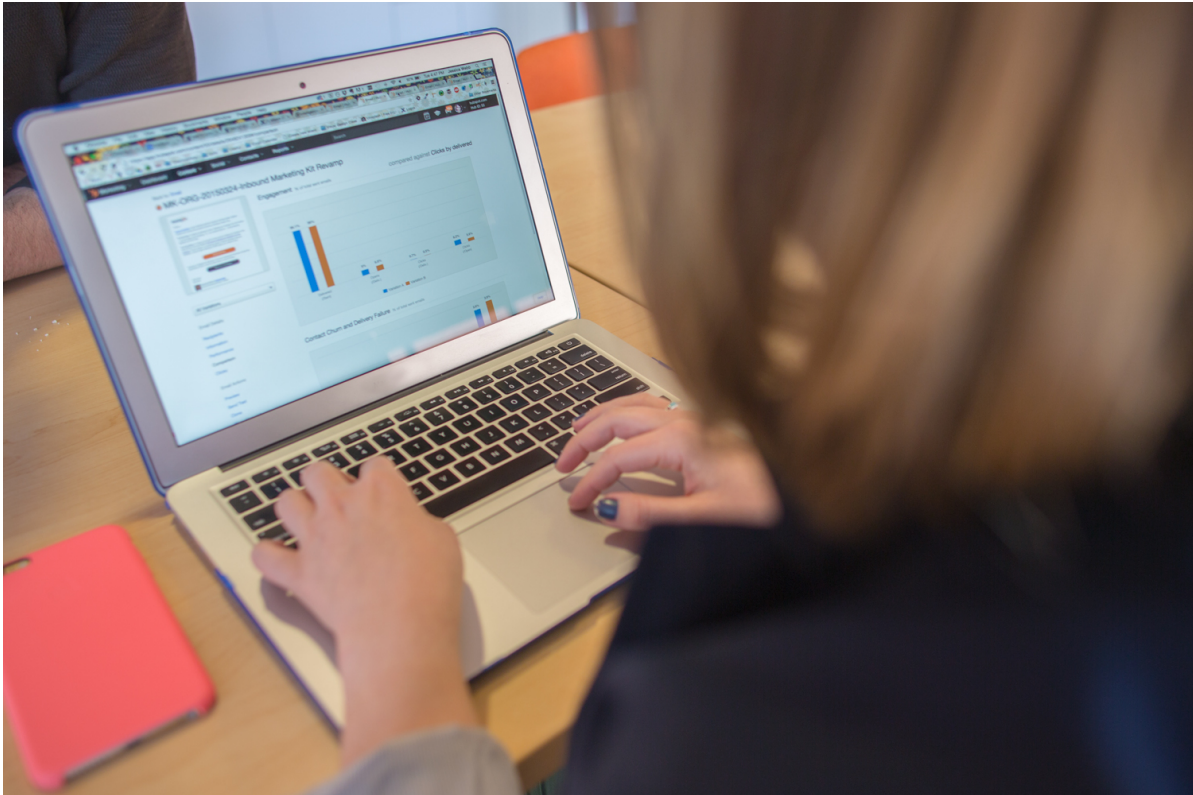
2. The Benefits of Using a CRM

3. CRM Features for B2B Sales

4. The Hubspot CRM

5. Learn More About the Hubspot CRM

# What is a CRM?



CRM or, “Customer Relationship Management” can sound intimidating to small- and mid-sized businesses. After all, if your company only has a handful of customers, why do you need a dedicated process, or complicated system to keep track of them?

A few spreadsheets and rules of thumb may do just fine, but what happens when business starts to boom and you need to get organized?

At some point, your company will need to implement some kind of customer contact management system (another way of saying CRM), that’s more organized and streamlined than a mass of spreadsheets. And such a migration of contacts and their associated data, could be painful if the decision has been put off a few too many months, or even years.

At its core, a CRM is not just useful to large enterprise companies -- it’s essential for B2B businesses of all sizes.

Did you know that 75% of B2B sales managers say that using a CRM helps to drive and increase sales? Or that CRM systems improve customer retention by 27%? It's hard to argue with numbers like that.

## So, let's start at the beginning ... What is a CRM?

CRM refers to software that helps companies track interactions with their future and current customers.

The goal of implementing a CRM is to create a system that your sales and marketing teams can use to more efficiently and effectively interact with prospects or customers.

Marketing will often use a CRM to ensure that they're passing the right leads to their sales team -- a key aspect of developing a strong relationship with the sales team.

Sales people utilize the CRM in a different way. They use it to source prospective customers, communicate with them, and track their interactions over time. Having the entire prospect history in one place increases their efficiency and improves their productivity. For instance, salespeople using a CRM won't have to hunt through their email to remember where a conversation left off.

## Which companies benefit from using a CRM?

The short answer is that any company who seeks to maintain a relationship with their customers can benefit from using a CRM system. To get a little bit more specific, there are two groups of companies that often see the most benefit:

» B2B companies that typically need to track marketing leads, the conversion process and customers across long sales cycles and through upgrade paths (e.g., a manufacturer, a software / technology company, a professional services firm, a recruiting firm)

» Considered purchase B2C companies (e.g., a jeweler, a landscaping service, a pool company, or a realtor.)

That being said, there are a lot of companies who don't fit the above two profiles, but still find value in using a CRM system. Another way to understand whether or not a CRM system can help your business, is to think about the challenges that CRM systems aim to solve - these are the typical ones for B2B companies:

- » Do you have a need for maintaining a central list of information on your leads and customers?
- » Does this information live in many different places in sales and marketing silos?
- » Are your customers regularly interfacing with multiple people on your team?
- » How does everyone keep track of where the conversation with any one customer left off?
- » Do you struggle to understand the productivity of your sales team?
- » Does your sales team follow a unstructured sales process?
- » Do you want to measure and track the sales funnel and generate reports for management?

If you answered yes to any one or more of the above questions, chances are your business could benefit from a CRM system.

# The Benefits of Using a CRM



We're going to talk about the benefits of a CRM for B2B organizations. Some people might think that B2Bs specifically have less need for CRMs considering they often deal with fewer clients on average than most B2Cs. But even if the end users are fewer, the volume and value of transactions is usually much higher - and the need to stay organized and track the communication and sales process, on a per customer basis, is so important.

There are many things a good CRM can do that should get marketers, salespeople, or business owners pretty excited!

Here's how a CRM can make you more effective at marketing and guide you to become a better sales machine...

## **1 | Better Lead Intelligence for Both Marketing and Sales**

Wouldn't it be helpful if you knew when a potential client was looking at your



website?

If you have a CRM that integrates with your company's marketing software, your sales team will know how many times potential clients have visited your site. If they're able to access this type of detailed, real-time lead intelligence all from one place, salespeople will have better insight into the prospect before they talk to them.

And this isn't just beneficial to sales; it's beneficial to marketing as well. A CRM will allow your marketing team to see which leads turn into clients. More specifically, you can see what brought them to your website and what pages they looked at before becoming a client. When a marketer works in a marketing platform that is integrated with a CRM, they're able to figure out which of their efforts are working best.

## **2 | Better Sales and Marketing (SMarketing) Alignment**

Sales and marketing both have numbers they need to hit each month, and when both teams have visibility into one another metrics they can easily assess each team's progress and identify and remedy problems early on in the month. To read more about steps you can take to close the sales/marketing gap, read one of our previous blog posts [here](#).

Real-time reporting holds both teams accountable to their goals and helps one another work together toward shared outcomes. (It's also worth noting that CRMs are used for clients too, not just leads; so client service communications and metrics can be easily documented for account managers to reference as well.)

## **3 | Helps Sales Prioritize its Pipeline**

A CRM not only gives complete visibility into the sales pipeline, but it also helps sales people prioritize who to call first so they don't miss important opportunities. When sales and marketing set up a CRM, they can identify important criteria and even implement a lead scoring system. Organizational systems like these reduce time spent sifting through leads, and enable salespeople to prioritize the best opportunities.

## **4 | Closed-Loop Reporting Lets Marketers Improve Campaigns**

When you integrate marketing software with your CRM, marketing can easily analyze the effectiveness of its campaigns using closed-loop reporting. For example, when a salesperson converts a lead into a paying client, he or she can

mark it in the CRM, and it will automatically be noted in your marketing software, too. This allows marketing to do two important things. First, marketing can automatically remove this lead from their nurturing sequences, and instead send it client-focused information. Secondly, marketing is now able to attribute this new client to a specific campaign and channel. Mapping marketing activities to sales events is critical for marketing to improve future campaigns.

When you have more streamlined processes, and a more connected sales and marketing team - lead nurturing comes naturally, and you avoid issues stemming from disorganization - such as missed sales opportunities.

To reap the full benefits of a CRM, you have to choose one with the features that are right for your business today, and that can grow with you as your business evolves. In our next chapter, we will discuss several must-have features that your business should look for when choosing a CRM.



# CRM Features for B2B Sales



When it's all said and done, a CRM system should be useful to its end users: salespeople, sales managers, marketers, and the leadership team. It shouldn't take a lot of training to be able to use, and it should be intuitive and user-friendly.

CRM systems in general, have a large range of features, but in our opinion, the following 9 features are essential for any B2B business that is aiming to organize their sales systems and improve their efficiency using a CRM.

## **1 | Contact Management**

You won't find a CRM that doesn't have a contact management capability. If you do, chances are you aren't looking at a CRM. All CRM systems allow salespeople to create contact records and store prospect and customer information in a database. However, the best systems that truly improve efficiency will reduce and streamline contact data entry as much as possible. You should judge this feature with ease-of-use in mind.

## **2 | Deal Stages**

Most CRM systems can be customized to operate on a specific sales process. Whether your company has three deal stages or 15, you should be able to customize these levels into the software and attach associated values. It should also be easy to move a deal along the sales process, from one stage to the next. In the HubSpot CRM for example, advancing a deal is as simple as dragging and dropping: Make sure the system you're using can be customized to your specific deal stages and needs with ease.

## **3 | Daily Dashboard**

Sales people need visibility into a number of metrics on a daily basis. Metrics such as their progress to date against quota, how many deals they have in their pipelines, and at which stages, and what outstanding tasks they need to complete. Similarly, sales managers and leaders need to be able to view these categories for the aggregated sales team. Evaluate this function based on visual appeal and simplicity.

## **4 | Task Management**

A sales person who has to toggle back and forth between several different systems to view and complete their daily tasks is not a happy person (though this is common). CRM systems that include task management capabilities streamline salespeople's day-to-day workflow and help them keep on top of their follow up process.

## **5 | Content Repository**

According to Docurated's State of Sales Productivity 2015 study, salespeople spend 31% of their time hunting for, or creating content. To cut back on wasted time searching for content, look for a CRM system with an embedded content repository. Look for a system that allows salespeople to save their go-to pieces of collateral in one place. And it's not just collateral. Writing email copy can be another time suck for a busy sales person. Look for a system that also allows the user to file away customized email templates, so the sales rep is not reinventing the wheel with every new outreach.

## **6 | Automated Data Capture**

One of the primary reasons companies decide to adopt a CRM is to keep better track of customer and prospect touches (emails, calls, etc). But, beware: Many

CRM applications require salespeople to copy and paste their email outreach into the system or even upload call recordings. These extra steps can be maddening for salespeople who are making 50 or 100 calls every single day, and it leaves room for human error. Look for a software that does this step automatically. HubSpot CRM automatically logs calls made and emails sent, and posts them in a timeline-like view on a contact's record page:

## **7 | Reporting**

A CRM system is only as good as the insights it provides. Be sure that your CRM provides reporting features that make it easy to export and distribute the trends that the system reveals.

## **8 | Mobile**

Sales reps have seen productivity increased by 15% and more, when they had mobile access to CRM applications. Tying reps to a CRM system that can only be accessed via laptop is bound to annoy them, especially if they're in a role that requires travel. The majority of CRM systems today allow salespeople to log on to the application from mobile devices such as tablets and smartphones -- make sure the ones you're considering do as well.

## **9 | Integration with Marketing Automation**

And last but not least, integration between your marketing and sales platform is crucial. After all, the underlying concept of "customer relationship management" is to provide a complete lifecycle view into each prospect and client. A gap between marketing automation and CRM can lead to lost information and lost opportunities.

When you find a CRM with the features you need for your B2B businesses to grow, you will reap the benefits of a more integrated sales & marketing team, and a streamlined communication process with your clients.

Next, we're going to be introducing **Hubspot's own free CRM** and how to get started with it.

# The Hubspot CRM



*“Traditional sales technology is necessary but not sufficient. HubSpot’s Sales Platform is designed to arm sales teams with the context they need to improve how they engage with companies, prospects, and leads to drive sales instead of driving people crazy.” - Brian Halligan, Hubspot CEO/Founder*

Hubspot most famous for its **marketing automation software**, has introduced a number of new features and tools as they constantly improve and make it easier for marketers and salespeople to connect with their audience, manage and nurture their leads, and close sales. But one of the best new tools hands-down is their user-friendly & lightweight CRM software.

## **Why Use Hubspot CRM?**

There are lots of CRM tools out there, some much more complex, requiring training & IT support - such as those from SAP, Microsoft Dynamics, and Salesforce.com. If you are using these types of CRMs successfully, Hubspot’s

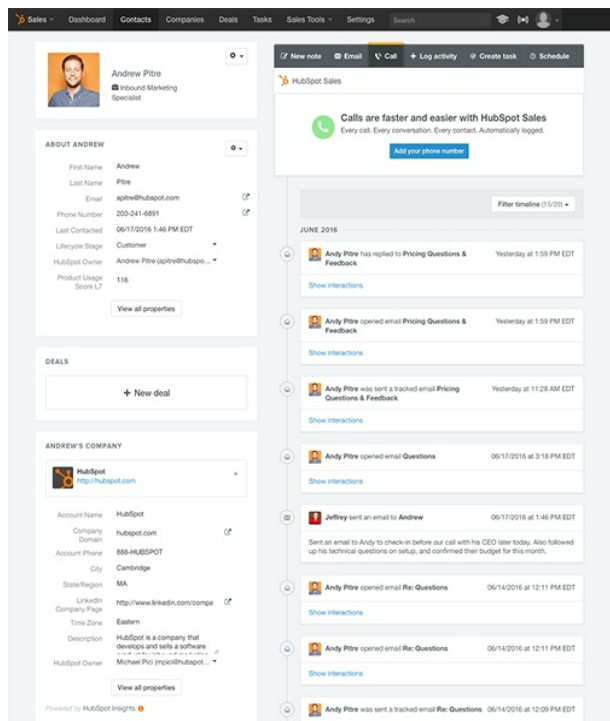
new CRM probably won't replace all the functionality you have.

But Hubspot CRM is a tool for B2B businesses that aren't already using a CRM or aren't using the one they have to it's fullest capacity, for one reason, or another - but will benefit hugely if they adopt one.

There are huge benefits to using Hubspot CRM, especially if you're already a Hubspot user. Total and seamless integration with Hubspot's marketing automation platform is a big one, allowing for minimal setup and training.

Even if you don't already use Hubspot, they have made this CRM so easy-to-use that it hardly requires any training at all. It has an "Apple OS-like" intuitiveness for users, that brings it a huge step above other available CRM software.

When you spend less time learning how to use a CRM and doing the admin tasks, you can spend more time SELLING. Which is exactly what Hubspot wants you to do. They have made this tool accessible and intuitive for sales reps, to follow the natural sales process so you can spend your time nurturing leads, instead of fiddling with a new process or new software.



But ease-of-use is not the only reason the Hubspot CRM is a great choice. It's also completely free to existing Hubspot users - no matter what their plan is. That means even if you're only on a basic hubspot subscription, you can still take advantage of this amazing sales tool.

## Hubspot CRM is Feature-Rich

Yes, this HubSpot tool is loaded with useful features:

- Collect and auto-manage details on your contacts, companies, tasks, and deal time-lines
- See timelines for your contacts easily see at-a-glance where your last conversation left off. Track emails, phone calls, and other communications including website visits and downloads!
- Integrates with your email so you can send emails right from the Hubspot CRM tool
- Integrates with your calendar so you can schedule meetings all within the CRM tool
- Drag-and-drop “board” feature that lets you organize your tasks and deals in an intuitive way
- Deal Stage, which allows you to see and track your prospective deals & sales pipelines and determine your closing probability.
- Automatic integration & syncing between Hubspot’s marketing tools & sales tools

There are even some additional-cost features to further enrich the experience if you need - such as phone call integration and a meeting scheduling tool to avoid those pesky “well, when are YOU free?” back-and-forth emails.

Hubspot has filled a gap in the sales & marketing void - if you use Hubspot already for your Inbound Marketing needs, you’ll love this new completely free sales tool. With its task automation and ability to integrate with tools you already use, you won’t need to re-learn your sales process.

Hubspot CRM is a natural evolution in the way you already sell and will benefit your process by helping you stay organized, and avoid missing lead opportunities because you didn’t have the right tools to help you focus on selling.

If you’re curious as to how to set-up this amazing new tool, or what to know more about Hubspot in general - give us a call today or schedule **a free consultation**.





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## Learn More About the Hubspot CRM

The Brit Agency is a Hubspot Gold partner, we can help your sales team learn more about the Hubspot CRM and how it can benefit your business.

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