An aerial photograph of a river, likely the Colorado River, showing a large dam in the foreground on the right. The water is a deep blue color, and the surrounding landscape is a mix of green and brown, indicating a semi-arid environment. The text is overlaid on the left side of the image.

# | The Beginner's Guide | to CRM

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STUDIOS

# The Beginner's Guide to CRM

“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 system to keep track of them? A few spreadsheets and rules of thumb will do just fine.

But what happens when business starts to boom? At some point, the organization will need to implement a customer contact management system that's more organized and streamlined than a mass of spreadsheets. And such a migration 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 businesses of all sizes.

But don't just take our word for it. Did you know that 75% of 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 ...

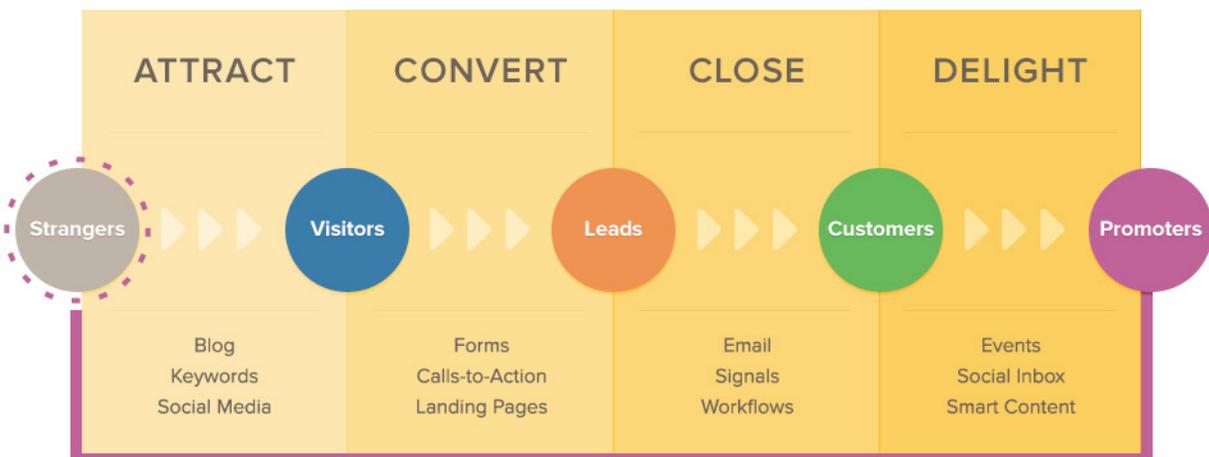
## What is a CRM?

CRM stand for customer relationship management, and it 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.

Salespeople 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.



# I Which companies use 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 leads and customers across long sales cycles and through upgrade paths (e.g., a software company, a recruiting firm)
- » Considered purchase B2C companies (e.g., a jeweler, a landscaping service, 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:

- » 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?
- » 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 structured process?

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

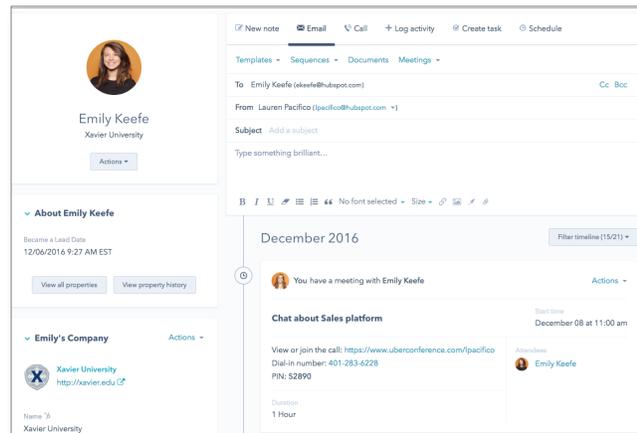
# Four Benefits of a CRM

There are many things a CRM can do that should get marketers, salespeople, or business owners pretty excited! Here's how a CRM can make you a more effective marketing and sales machine...

# Four Benefits of a CRM

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

Wouldn't it be helpful if you knew when a potential customer was looking at your website? Implementing a CRM will allow your sales team to know how many times potential customers have visited your site or if they have ever talked to a member of your sales team.



When a salesperson works within a CRM that integrates with their company's marketing software, they're able to access this type of detailed, real-time lead intelligence all from one place.

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 customers. More specifically, you can see what brought them to your website and what pages they looked at before becoming a customer.

When a marketer works in a marketing platform that is integrated with a CRM, they are able to figure out which of their efforts are working best.

# I Four Benefits of a CRM

## 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.

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 customers, too, not just leads; so customer service communications and metrics can be easily documented for account managers to reference as well.)

## 3 | Help 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.



# | Four Benefits of a CRM

## 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 customer, 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 customer-focused information. Secondly, marketing is now able to attribute this new customer to a specific campaign and channel. Mapping marketing activities to sales events is critical for marketing to improve future campaigns.

# Nine Must-Have CRM Features

Before all else, a CRM system should be useful to its end users: salespeople, sales managers, marketers, and business leaders. CRM systems have a range of functionalities, but these nine features are must-haves for any business that is aiming to organize their systems and improve their efficiency.

# I Nine Must-Have CRM Features

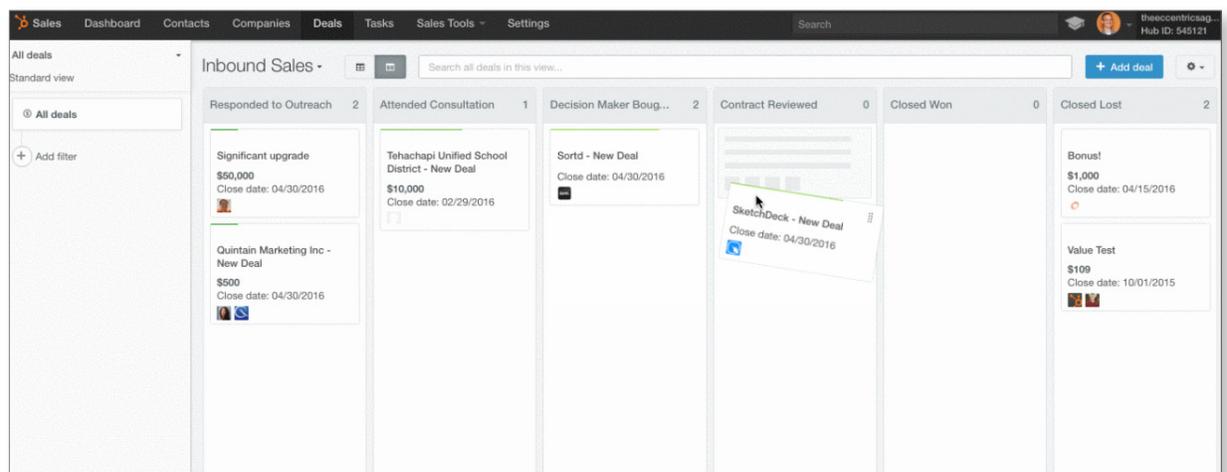
## 1 | Contact Management

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. 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 program 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 HubSpot CRM, advancing a deal is as simple as dragging and dropping:



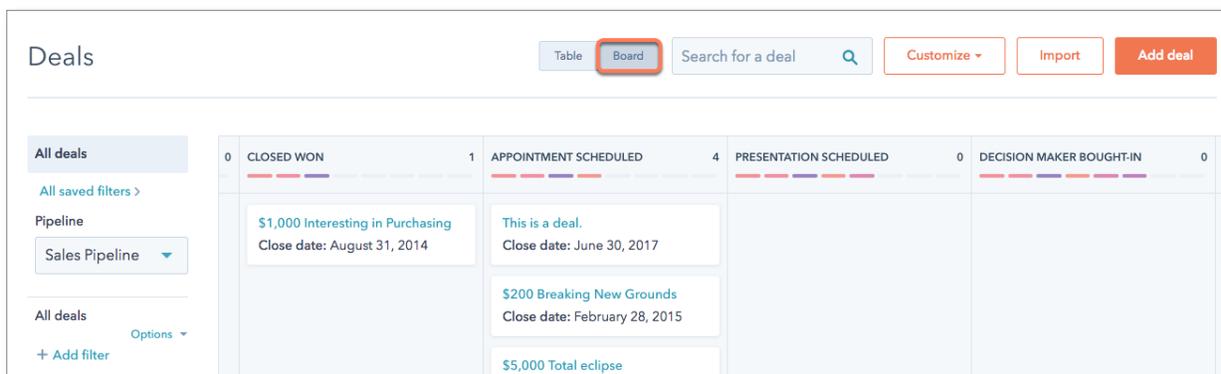
Make sure the system you are using can be customized to your needs with ease.

# I Nine Must-Have CRM Features

## 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 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.

# I Nine Must-Have CRM Features

## 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.

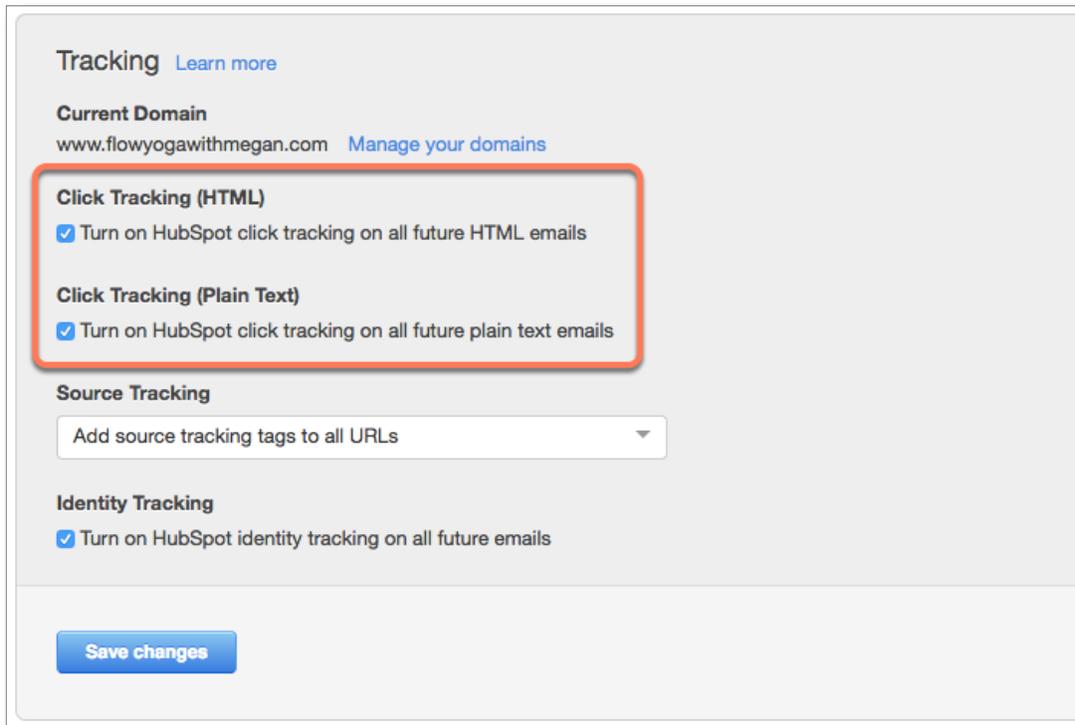
The screenshot shows an email template editor interface. At the top, the 'Template name' is 'Inbound Lead from Content' and there is a 'Select a Folder' dropdown. The 'Subject' is 'Enjoying our content?'. The email body contains several tokens: 'Hey **contact.firstname** -', 'Hope all is well. I saw that you were recently on our site and downloaded **company.recent\_conversion\_event\_name**. I hope you're enjoying it and finding it useful for your work.', 'I did a little research on **company.name** and discovered a few areas where I might be able to be of even greater use to you and your company.', and 'When would you like to take a few minutes to discuss? Please let me know what times work for you.' Below the text is a rich text editor toolbar with icons for text, image, and link, and an 'Insert' menu with options for Document, Contact token, Company token, and Meetings link. At the bottom, there are 'Save template' and 'Cancel' buttons, and a checked checkbox for 'Share this template with my team'.

# I Nine Must-Have CRM Features

## 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:



The image shows a screenshot of the HubSpot CRM Tracking settings interface. The interface is titled "Tracking" with a "Learn more" link. Below the title, it shows the "Current Domain" as "www.flowyogawithmegan.com" with a "Manage your domains" link. The "Click Tracking (HTML)" section is highlighted with a red box and contains a checked checkbox for "Turn on HubSpot click tracking on all future HTML emails". Below it, the "Click Tracking (Plain Text)" section also has a checked checkbox for "Turn on HubSpot click tracking on all future plain text emails". The "Source Tracking" section features a dropdown menu currently set to "Add source tracking tags to all URLs". The "Identity Tracking" section has a checked checkbox for "Turn on HubSpot identity tracking on all future emails". At the bottom of the settings panel is a blue "Save changes" button.

# I Nine Must-Have CRM Features

## 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.

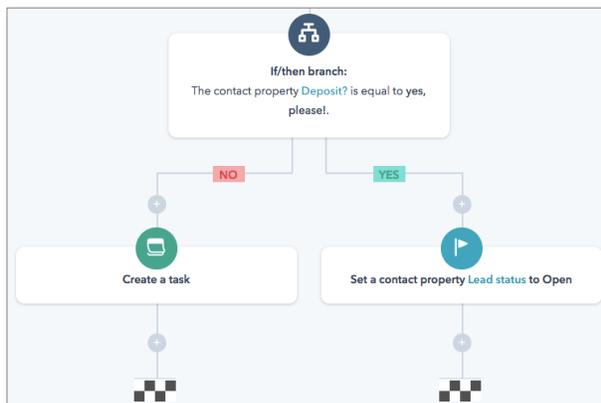
Source	Visits	%	Contacts	%	Customers	%
Organic Se... Google, Bing, ...	571,037	1.5%	8,488	0.3%	24	0.0%
Referrals Links on other...	99,812	2.4%	2,401	0.1%	2	0.0%
Social Media Facebook, Twi...	137,527	2.3%	3,105	0.1%	4	0.0%
Email Mark... Email links	288,165	1.8%	5,141	0.3%	18	0.0%
Paid Search Paid search a...	4,187	3.1%	128	2.3%	3	0.1%
Direct Traffic Manually ente...	637,514	1.2%	7,483	0.5%	39	0.0%

## 8 | Mobile

Sales reps have seen productivity increased by 15% 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.



# Conclusion

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. Think about your company's growth goals, and consider both your short-term and long-term needs when investing in a CRM platform.

Keep in mind, a CRM is not only a financial investment, it is also a time investment for your sales and marketing organization. Picking the right system, implementing it, and enforcing best practices around its usage will pay dividends as your company continues to grow and scale.

# Contact Us

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