



ARIZONA
SMALL
BUSINESS
BOOT CAMP &
COLLECTIVE

RESPOND → PLAN → RETURN STRONGER



How Can CRM Help my Business?

PRESENTED BY

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The Customer Experience



“You’ve got to start with the customer experience and work backwards to the technology.

You can’t start with the technology and then try to figure out where you’re going to sell it.”

Agenda

- What is CRM?
- How Can a CRM Help My Business?
 - CRM Basic Definitions
 - 360 Degree View of Customer
 - Marketing Automation
 - Managing Your Sales Pipeline
 - Managing Client Activities
 - Reports and Dashboards
- How Do I Get Started?
 - CRM Options



What is a CRM?

- CRM is defined as **Customer Relationship Management**
- A Software or Platform that helps businesses manage and nurture their relationships with their clients
- A CRM assists with organization, efficiency, time management, and impressing clients every step of the way
- CRM platforms are powerful systems that connect all the data from your sales leads and customers all in one place
- A CRM records and analyzes all calls, **emails** and meetings, helping improve customer service, drive sales, and increase revenue



How Can a CRM Benefit My Business?

A CRM tool will catapult your small business to a new level if you know how to use it.

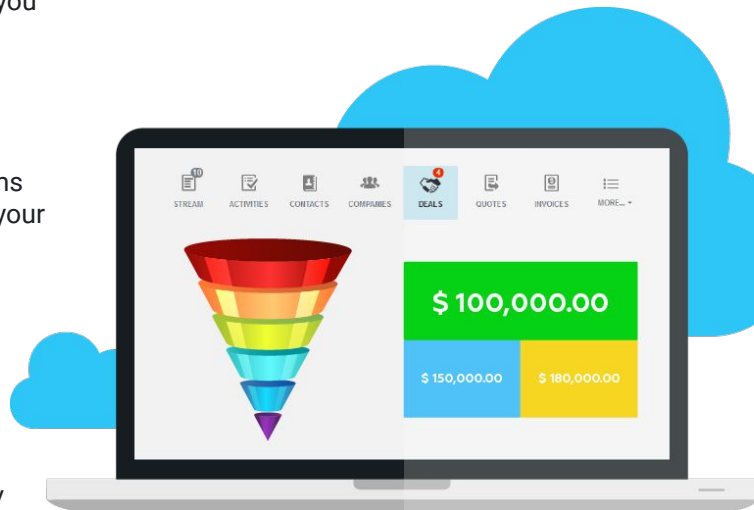
6 benefits of CRM



- Streamlined Communications
- Customers Segmentation
- Sales Forecasting
- Improved Reporting & Analytical Data
- Protection of Data Privacy
- Automate Tasks and Processes
- Track Customer Activities

CRM Basic Definitions

- Lead or Prospect
 - A prospect client is **an individual who meets a specific set of criteria** and that you can therefore identify as a potential client you can make a sales pitch to
- Account or Customer
 - Account represents **an individual customer account, organization or partner involved with business**. As part of standard functionality of most CRM platforms provide Account objects in Salesforce which stores all account details related your business like Customers and Competitors.
- Contact
 - In a CRM, the people who work at or with your accounts are called **Contacts**
- Opportunity or Deal
 - Opportunities are past or pending sales for an account that you want to work and/or track. **Opportunities** plays major role in an organization because they represents sales and potential sales. Using Opportunities we can forecast sales in an organization.
- Lead Generation
 - Lead generation is the process of reaching out to your audience, **building awareness about your business** and identifying potential customers for your products and services.



360 Degree View of the Customer



- The 360-degree customer view is the ideal state that **companies can get a complete view of customers by aggregating data from the various touch points that a customer may use to contact a company to purchase products and receive service and support.**
- Perhaps one the most important benefits of a 360-degree view of the customer is that it **provides the ability to deliver more personalized shopping experiences.**
- Businesses can use aggregated, invaluable, data to provide customers with more personalized experiences across their lifetime shopping journey.

Marketing Automation



- You can get personal at scale as you delight every one of your prospects and customers with just-for-them messages.
- You can track, segment and slice the data to make your sales and marketing smarter, more potent and more efficient.
- **A good CRM knows and will assign a score or a value to each prospect in your pipeline** and give you weighted sales projections.



Manage Your Pipeline to Win!



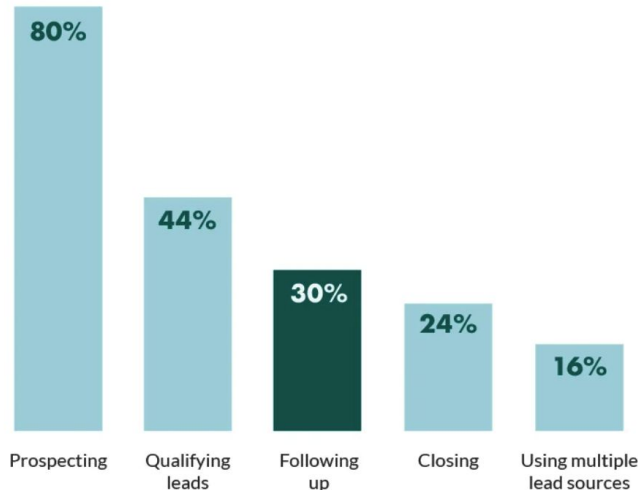
Managing Your Sales Pipeline



- If there's one thing that top performing sales companies do well, it's manage their pipeline. But, how can you improve your pipeline and processes?
- If you are looking for ways to improve sales performance? The answer could be in your sales pipeline.
- According to research by [Vantage Point](#), 72% of sales managers hold sales pipeline review meetings with their sales reps several times per month.

Managing Your Sales Pipeline

WHAT PART OF THE SALES PROCESS IS THE MOST CHALLENGING FOR YOUR TEAM?



How Do I Manage My Sales Pipeline?

- Remember to follow up....
- Focus on the best leads. ...
- Drop dead leads....
- Monitor pipeline metrics....
- Review (and improve) your pipeline processes....
- Update your pipeline regularly....
- Keep your sales cycle short....
- Create a standardized sales process....

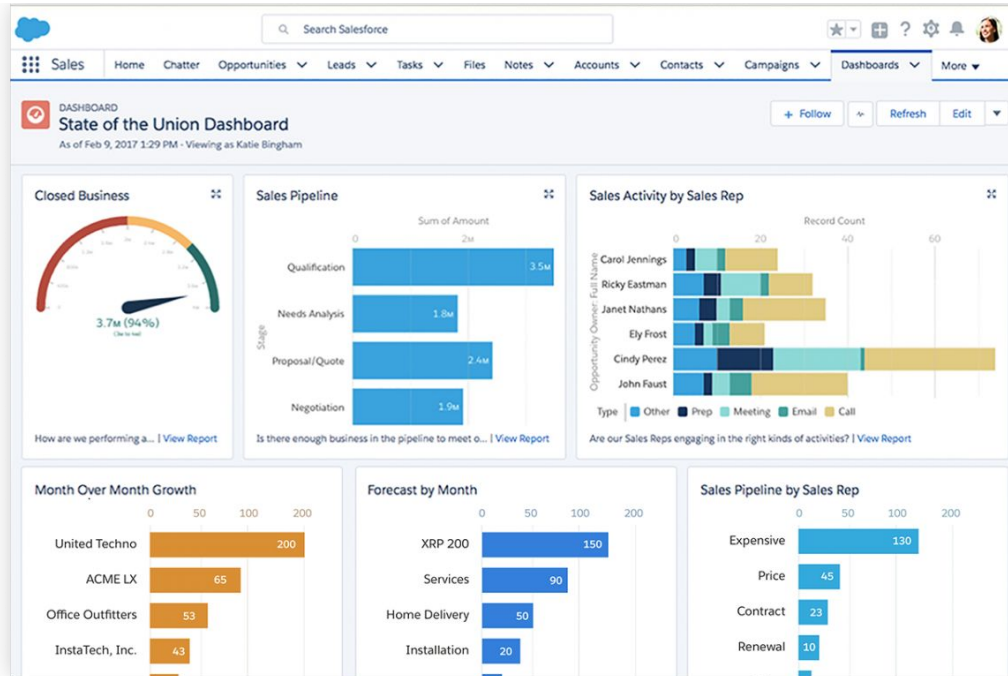


Managing Client Activities



- Integrate with Your Email & Automatically Log Emails
- Send Automated Emails Based on Client Actions
- Manage & Create New Tasks
- Manage & Create New Events
- Integrate with Your Phone & Automatically Log Calls
- Set Activity Goals For You & Sales Team

Reports and Dashboards



- Reports and Dashboards are **the analytical side of the CRM.**
- A Report is a **list of data generated based on predefined criteria.**
- They are used to convert business requirement into Visual representations like Graphs, Pie Charts, Tables, Scatter Chart, Gauges, Metrics, Funnel chart etc.
- Reports can be displayed in either rows or columns and be public, shared, hidden, and read-only or with write access.
- The benefit of reports in Salesforce is being able to quickly and easily understand the data within the system.

Paid CRM's



CRM's w Free Options





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**Reach Out with
Questions**