



Post-Training Support

Customer Relationship Management

CRM is a strategy, process and technology that lets your company makes the most of every sale by optimizing revenue and getting a better understanding of the customer's needs. The CRM combines marketing and customer service into a single software-driven technology. All important customer information is combined. Each interaction with a customer is recorded and the information is used to manage measure and keep track of the processes of marketing, sales and customer service as they relate to that customer. This eliminates communication mistakes between Sales, Marketing and Customer Service. With CRM everyone has access to what's going on with every customer and can access the information necessary to keep that customer happy. This also helps the Sales Department extend the relationship deeper into the company. Marketing can use the data to develop new business solutions, directions, and more effectively communicate the offerings of the company.

CRM Setup

- Plan the details of the information you want to collect.
- Set up procedures and protocols for how the information will be entered.
- Standardize phrasing and abbreviations for company names or address information.
- Create drop-down lists for common terms and items that everyone would use.
- Agree on report formats and styles and set up templates.
- Set up time to thoroughly train your sales team and have an accessible resource for future questions and suggestions.
- Support your sales team's efforts.
- Give them the tools and technology they need to succeed and beat the competition.
- Communicate regularly with your team.
- Mediate internal conflicts before they drive good sales reps away.
- Foster good relationships between your sales team, production and administration.
- Take action to fix problems as they arise, *not* after you've lost your team.

Companies that don't implement some form of CRM may have a hard time keeping their customers as happy as their competitors who have a CRM system do.

Notes