

The need for smarter CRM software

 By [Candace van Zyl](#)

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With the shift from [product-focused to customer-focused business](#) in most organisations in the modern world, CRM software is at the forefront of customer satisfaction.

What is CRM software?

[CRM software](#) (customer relationship management) is effectively a database of customer information that contains more than just contact details. It orders and stores interactions of the customer with the business, be they support requests, purchase history, purchase preferences and frequency. It makes all of this information available to everyone in the business so that there is a single truth across the business for each customer - no duplications, no out-of-date records.



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Why CRM?

Before we go into why CRM software needs to be smarter, let's unpack what it can do already. CRM offers tremendous benefits to a business:

- **A single view of your customer:**

- You get clarity on your customer base, reps, transactions and history so that you can keep your current customers happy and loyal, and protect sustainable revenue.
- It also consolidates and simplifies the presentation of otherwise overwhelming customer information and documents into a single dashboard so business users can more easily access and manage it.

- **Optimises your business:**

- It ensures your sales, marketing and customer service resources are used to maximum effect.
- It reduces a heavy, slow reliance on Excel spreadsheets and improves efficiency.
- Dashboards and reports provide visibility into the performance of individuals and remote sites.
- CRM reduces time spent on reporting and administration. It automates various workflow processes such as

tasks, calendars and alerts.

- It gives managers the ability to track performance and productivity based on information logged within the system.

- **Improves customer service:**

- Staff have everything they need to provide exceptional service to your customers.
- It has great time-saving centralised diary and appointments functionalities and offers enterprise-wide visibility at every step of the sales and service cycle.
- CRM ensures you meet customer service level agreements.
- It helps your Customer Services team keep track of your customer queries with ticket numbers, notes, reminders and actions.
- It gives customer-facing staff detailed information on customers' personal information, purchase history, buying preferences and concerns. It personalises every interaction.
- Gives access to detailed information about customers better shapes your interactions around their needs.

- **Improve sales:**

- Helps you discover and diagnose shortcomings in the sales process, and plug leaks in the sales pipeline.
- You can separate the best reps from underperforming ones through easy-to-access reporting.
- It prevents the awkward situation of two salespeople pursuing the same prospect.
- It grows your pipeline, track leads, and manage customers.
- Builds stronger prospect/customer relationships with sales reps knowing up-to-date background and the latest details before a call or meeting.
- It improves sales forecast accuracy through real-time updates. Helps you take complete control of your sales team.

- **Instant management reports and intel:**

- Automated reports mean you save on admin time and staff. You can usually export reports to Excel.
- Manage customer information, tracking opportunities, extensive marketing campaigns and delivering training and customer service. You can also automate marketing campaigns and measure results.

What is needed now?

This is all very good and well. Any CRM system worth its salt should offer all of the above, give or take a few items. However, if we are to stay ahead of the pack, the need for a more integrated solution is apparent.

The idea of adding a personal touch, or going over-and-above is not a new one, but if your company does not do these things, and your competitor is, your customer will vote on who they support with their money.

1. **Provide a live link to transactions:** Not only do we need to track sales, support and interaction records of our customers to deliver the best customer experience, but the need now exists to take CRM to a more intuitive level where the customer barely has to lift a finger and we have fulfilled their wish. This is done by linking customer records to transactions. This way, predictable buying patterns can be established and order fulfilment, stock replenishment, production planning and delivery could take place pro-actively, reducing delivery time and adding the 'surprise and delight' element we all aspired to.
2. **Provide links to the entire business:** Organisations can no longer set sales targets behind closed doors based on shareholder pressure and bottom line alone, and then send their sales reps out to blindly meet them. In order to best meet your customers' need, sales managers and reps need visibility into the organisation's production line, inventory, and even some accounting.

Let me explain: In order to eliminate frustration due to slow or non-delivery, reps should be able to check how loaded the production stations are so that they don't over-sell an already crowded production line. Access to inventory will show if stock needs to be shipped in to fulfill the order, so that customer expectations can be set. CRM should also be linked to the company's accounting so that reps are alerted if a customer account is in arrears before taking on the next order.

3. **Eliminate silos:** Business systems are like Christmas dinners - it's awkward and painful if no-one talks to each other. Spreadsheets and isolated systems per department are probably not the best way to improve efficiency and will buckle and fail if you add the strain of compounded growth. More and more organisations are turning to systems that allow departments to 'talk to each other'. For example, ensuring the marketing team has access to the latest stock levels means that marketing campaigns are well-informed and are not a frustration to the sales team or to the warehouse, and that slow-moving stock can be easily selected for special deals. CRM should also allow:
 - Sales/production/performance analytics to be readily available.
 - Check supplier prices for best competitive advantage.
4. **Security and control:** With so much business data now potentially accessible to the entire business, control and security access levels need to be a high priority function of this system, so that sensitive information is kept safe, but business information is made available to empower your team.

It may sound like a tall order or something we could only expect in a few years, but the reality is that CRM on its own is not enough to keep your business relevant and competitive and your customers loyal.

Perhaps a more fully-integrated business operating system is what is needed in order to best satisfy your customer's needs; linking CRM to production, inventory, accounting, and reports, and making this clean, secure data available to your business.

This way, we make our customers happy. And a happy customer keeps you open for business.

ABOUT CANDACE VAN ZYL

Candace is the marketing manager at QuickEasy Software, a proudly South African software company in Cape Town with a national footprint, focused on simplifying business processes by integrating every aspect of the business cycles into one, easy-to-use system. With a well-known legacy in the printing sector in South Africa, QuickEasy is now effectively offering the same efficiency-improving software to packaging, and to all businesses, in South Africa.

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