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Jorge Carrola Rodrigues





**CRM**  
FOR  
**DUMMIES®**  
MICROSOFT LIMITED EDITION

**By Jorge Carrola Rodrigues**

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# Introduction



**C***RM For Dummies* introduces a software tool that handles customer sales and marketing in an easy-to-use environment so that you can be more productive at sales, execute campaigns near your customer base and serve your customers better. Maybe you already use a CRM application. Or maybe you thought your Outlook was a CRM system (which it's not). Or maybe you think CRM is limited to large enterprises, which it's not by all means.

In this book, you get acquainted with a software tool that can be as easy to use as Outlook, totally integrated so that you almost don't know the difference while at the same time being both practical and operational. You're also introduced to the new flavors of CRM, such as Social CRM, Mobile CRM, or XRM. Customer intimacy is key for loyalty and increased sales, and today you already have CRM that was built based on how you work!

## *About This Book*

In this book, you discover information about functionalities that will improve the way you handle customer contacts, leads, opportunities and case resolution. These out-of-the-box functionalities can make your sales and marketing processes more effective and efficient. Thanks to free trials, you'll be ready to put your hands on and experience the power of operational CRM for you and your organisation.

## *Foolish Assumptions*

Here are some assumptions made about you when writing this book:

- ✔ You work in management, sales, marketing or customer service.
- ✔ You want to be more efficient on getting leads, closing opportunities, controlling the pipeline accuracy, growing more satisfied and repeatable customers and saving money (all at the same time).
- ✔ You're familiar with CRM, but think it isn't simple to use or acquire.

## *How This Book Is Organised*

*CRM For Dummies* is divided into five small but perfectly formed parts:

- ✔ **Part I: What Is CRM?** — Head here for a quick introduction on what operational CRM may be and some of the most common functional areas covered.
- ✔ **Part II: Improving Sales Management and Pipeline Control** — This part shows you how CRM handles accounts, opportunities and pipeline management for more effective sales.
- ✔ **Part III: Making the Most Out of Marketing and Loyalty** — In this part, you discover how CRM helps build campaigns, gets results and fills the pipe of opportunities to hand over to sales. You also find out how you can use CRM to improve customer service, post-sales and contract management.



- ✓ **Part IV: Exploring Social CRM, Mobile CRM and XRM** — In this part, you see how CRM has extended its reach both from inside the organisation to everywhere, anytime and beyond customers to any type of entity relationship management.
- ✓ **Part V: Ten (Well, Nearly) Top Tips for CRM** — No *For Dummies* book is complete without the lighthearted Part of Tens, and this book is no exception. This part highlights key points to remember as you jump into the world of CRM.

## Icons Used in This Book

The following icons highlight important text:



This icon warns you of common mistakes to avoid.



The knotted string highlights important information to bear in mind.



Home in on the target for tips to enable you to get better sales and marketing processes.

## Where to Go from Here

As with all *For Dummies* books, you can either read this guide from cover to cover or flick straight to the section that interests you. Whether you read it in small doses using the section headings or all in one long session, you'll find plenty of information to get you on your way to use CRM as a tool for better customer management and sales.



## Part I

# What Is CRM?

---

### *In This Part*

- ▶ Understanding what CRM is
  - ▶ Exploring the different types of CRM solutions
- 

**C**RM is often thought to be just software tools, but CRM helps you and your business focus on your customer. In this part, you find out what CRM truly is.

## *CRM at a Glance*

CRM (Customer Relationship Management) emerged in the late '90s as a business strategy centered around the collection and handling of information related to customer relations and transactions, supported by a technological solution. CRM is a supplemental solution to the most usual core applications in order to extract added value from existing customer data.

Usually, an organisation's core of applications consists of

- ✔ **Transactional applications:** Transactional applications, which take place, for example, in a bank or a shop, are the applications used in the front office or counter to handle the transactions between the organisation and the customer.

These applications usually don't collect and handle customer or prospect information or customer relations and interactions.

- ✓ **Management or accounting applications:** These applications are used in the back office to consolidate data necessary to accomplish accounting obligations, among others, or to help the management of the organisation in areas such as financial management, logistics, production or human resources.

## *CRM: The Details*

CRM is an integrated management system focused on customers and prospective customers. It contains the processes and procedures that build a business management model centered on a 360° approach to the customer.

The management processes in which CRM is based are undoubtedly at the forefront in terms of strategy and marketing, and also at the economic and financial level. Indeed, companies that are thoroughly familiar with their customers can create custom responses, anticipating their wants and needs and answering their major wishes.

In order to build a smarter CRM strategy, the technology responds only to the company's strategy by helping to capture data about the client and external sources and consolidate that data in a central data-warehouse. Additionally, integrated marketing and information technologies provide the company with integrated and effective means of meeting, recognising and caring for the client in real time. CRM applications transform the

data collected into information that allows a better understanding of the customer profile.

The CRM platforms build on customer-centric processes, disseminated throughout the organisation. CRM extensively uses information related to the client by integrating the areas of marketing, sales and service and verifying the creation of customer value.



Before you implement CRM, you need to understand what model of customer relationships the company intends to adopt and which customer care processes need to be redesigned.

## *Types of CRM Solutions*

There are several types of CRM solutions:

- ✓ **Collaborative CRM:** Aimed at sharing information on various types of interactions that customers have with the organisation and its different departments, either through direct interactions, by email, by letter or by fax.
- ✓ **Analytical CRM:** Functions include performance analysis and business intelligence. The analytical CRM lets you work all the specific information about how the various customer segments like to be treated.
- ✓ **Operational CRM:** The application interacts directly with the customer by integrating the front office, back office and mobility. This type includes the functional areas of sales force automation, contact management, automation of marketing activities and customer service.



This book focuses on the Operational CRM, which addresses mainly

- ✓ Salesforce automation and contact management
- ✓ Marketing automation
- ✓ Customer service automation

## Part II

# Improving Sales Management and Pipeline Control

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### *In This Part*

- ▶ Taking a look at CRM and account management
  - ▶ Refining sales management, productivity and planning
  - ▶ Integrating opportunity automation management
  - ▶ Increasing opportunity and pipeline management
- 

**A**dd CRM as a tool, and you and your salesforce will begin to reap the many benefits. You'll not only enjoy increased sales, but a smoother and more efficient sales process. And those benefits are just the beginning!

### *Reaping the Benefits of CRM*

Getting more sales and winning more deals are the major drivers for growth in organisations. Enhanced sales productivity is why salesforce automation is among the most demanded areas to start implementing a CRM.

With an efficient and easy-to-use sales management tool, the sales managers enjoy dramatic improvements in the sales cycle control, close rates and current information about sales performance.



A CRM system that is totally integrated with the most common productivity tools, such as word processors, spreadsheets and email, and that has embedded integration of all contacts is a powerful tool for the salespeople, and the adoption is almost immediate.

## *Looking at CRM and Account Management*

Account and contact management are positively impacted with the usage of a CRM system with the possibility to

- ✓ Keep consistent and updated information about each customer account and contacts, avoiding duplications and different views of the same contact or account.
- ✓ Monitor all activities and interactions with each contact and account.
- ✓ Pinpoint the opinion leaders, supporters and blockers in each account.
- ✓ Identify instantly possible crossed opportunities in each account.
- ✓ Receive alerts regarding contract renewals and activities to be performed in programmed periods before the due dates.



## *Improving Sales Management, Productivity and Planning*

Sales management, productivity and planning are enabled in a CRM system. As a result, you can

- ✔ Use the CRM tool integrated with your Microsoft Office Outlook.
- ✔ Find immediately the information you need in visualisation panels, where you can access contacts (including those recently used) and contact lists.
- ✔ Improve team communication and collaboration dealing with customer organisations, through transparent integration with productivity, collaboration and portal technologies.
- ✔ Reduce time cycles in data import uploads and keep quality data with duplications removed.
- ✔ Use the most updated CRM data in Microsoft Office Excel with bidirectional synchronisation of data.
- ✔ Easily build sales and territory teams in order to create a more effective organisation.
- ✔ Create list prices with allowed discounts for specific groups of customers in order to simplify proposals management.
- ✔ Have a resource center built into the CRM where you can gather sales best practices and recommendations.
- ✔ Use consistent permissions based on functional roles and groups, which makes distributing information easier and faster.

## *Integrating Opportunity Automation Management*

Connected sales and marketing processes are an area that CRM also helps improve.

A proper CRM decreases the black hole of leads that are handed over from marketing activities to the inside sales and sales teams, making it easy to follow up, based on predefined rules.

The marketing activities already loaded into the CRM are integrated in a process workflow that significantly reduces the generated leads and that are unprocessed by sales or inside sales.

The CRM also lets you easily identify new opportunities based on the immediate segmentation of the database.

## *Increasing the Efficiency of Opportunity and Pipeline Management*



Opportunity and pipeline management are among the areas that suffer a dramatic increase of efficiency with a proper CRM implementation.

You can shorten the sales cycle while also increasing customer and prospect satisfaction simply by sending proposals and sales agreements faster. The CRM is able to store or integrate with a repository of template standard documents that are instantly fulfilled with the specific conditions for the proposal under discussion.

You should look at several aspects of a state-of-the-art and easy-to-use CRM software:

- ✔ Establish consistent sales processes across the enterprise with predefined workflows.
- ✔ Look at a CRM that integrates directly sales methodologies, such as Miller Heiman, SPI and TAS.
- ✔ Identify and take advantage of potential influencers in the sales process (for example, lawyers and consultants).
- ✔ Position yourself more effectively against the competition with a continuous monitoring of the competitor.
- ✔ Identify the main trends of negotiations won or lost and optimise sales processes.
- ✔ Improve financial planning through greater control and predictability of the sales pipeline.
- ✔ Increase the accuracy of revenue projections with individual or combined forecasts.
- ✔ Use predefined criteria to control the revenue targets by date or fiscal periods.
- ✔ Instantly control sales quotas compared with the performance both by individual salesperson or by group of salespeople.



## Part III

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# Making the Most Out of Marketing and Loyalty

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### *In This Part*

- ▶ Simplifying segmentation
  - ▶ Getting the most out of campaigns
  - ▶ Knowing what to look for in contract management, case support and service planning
  - ▶ Remembering mobility and services
- .....

**M**arketing automation is one other important area of an operational CRM. Very often, the organisations have a database of customer or prospect contacts and want to promote their offer on these but don't know how to do so. The marketing solution of the CRM should be very flexible and easy to use, allowing you to sell more efficiently while improving productivity.

In addition, if your customers aren't happy, then you have problems. Fortunately, CRM even helps you make your customers not only happy but coming back for more.

## ***Making Segmentation Easy***

Easy segmentation and contact management is possible with a CRM, which

- ✓ Uses natural language for customer information retrieval and segmentation.
- ✓ Creates contact lists that are focused and associated to campaigns.
- ✓ Creates reusable personal and public views.
- ✓ Easily shares marketing lists with other team members.
- ✓ Uses lists for mass email marketing or mail merge printing.

## ***Planning and Executing Campaigns***

The CRM allows you to simplify campaign planning and execution with

- ✓ Marketing plans easily created with integrated document management resources.
- ✓ Planning and control of activities, tasks, budgets and details for each marketing activity.
- ✓ The possibility to create product catalogs and list prices inside the CRM.
- ✓ Easily adaptable messages and unsolicited proposals for highly targeted lists.
- ✓ Reusable campaign templates that save time and money.

- ✔ Predefined workflows to streamline processes and approvals.
- ✔ The possibility to initiate and distribute campaigns and communications instantly.
- ✔ A central platform that allows you to control and manage all details of campaigns and clients.
- ✔ Rules created to react and give answers based on customer interests.

## *Looking at Campaign Results and Opportunities*

The goal of campaign execution is to generate responses that translate into added business opportunities. So it is important that the CRM solution is able to monitor and manage the feedback from the campaigns, centralising these results and then automatically converting campaign responses into leads and then distributing those leads automatically to the sales resources according to specific rules.

The potential opportunities generated from campaigns should be easily controlled in the CRM, with

- ✔ Improved coordination between sales and marketing, with both having a common view on the CRM.
- ✔ Automatic promotion of the most interesting leads to be processed by inside sales or other salespeople.

## ***Keeping Customer Satisfaction in Mind***

Modern CRM solutions handle not only sales but also services. It is important for customer satisfaction and loyalty and sales productivity that information about issues, cases or incidents and contracts is also handled through the same solution.



The sales team has a total view on the customer and won't try to push a sale if, for instance, a customer has an issue to be solved that is affecting his satisfaction.

Customer service, on the other hand, knows which customers should be supported and their value to the organisation. It is possible to have a real customer value based on the margin released from sales less the costs associated with sales and support.

Some of the functionalities available in a services module of a CRM include maintenance contracts management, case support and knowledge bases, resource planning and full-time availability to mobile workforces.

## ***Looking at Contract Management, Case Support and Service Planning***

Contract management, case support and service planning functionalities available in CRM should include



- ✔ Usage of workflows to launch activities that support distribution of the cases among the agents according to the right level of service.
- ✔ Management of incidents distribution through individual and team queues.
- ✔ Full access to customer data and incident so that you have quicker response times.
- ✔ Rule-based approvals and escalations to route the incident to the correct person.
- ✔ Increased first-time case resolution with the internal repository of knowledge.
- ✔ Capability to program services and resources to serve customers efficiently.
- ✔ Connection to teams with a centralised view of calendar and services.
- ✔ Monitoring and measurements of the performance of organisations, business units, teams and individuals.
- ✔ Detailed analyses and updated key performance indicators (KPI).

## ***Integrating Mobility and Services***

One other important feature in today's services module of a CRM is the level of integration allowed with mobile devices. This is also a great enabler for increased productivity, giving the possibility to

- ✓ Distribute reports and alerts via mobile devices.
- ✓ Manage and update schedules and service commitments.
- ✓ Access and send data from the CRM customer service through any Web-enabled device.

## Part IV

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# Exploring Social CRM, Mobile CRM and XRM

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### *In This Part*

- ▶ Looking at XRM
- ▶ Reaping the benefits of mobile CRM
- ▶ Keeping in mind social CRM

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**Y**ou may have heard of XRM, but not know what it is or how it compares to CRM. In this part, you can find out the inside scoop of what XRM really is and how it relates to CRM.

### *Getting the Inside Scoop on XRM*

CRM software has become a necessity for many large companies, enabling them to more effectively manage customer relationships. As CRM matured, companies realised that an effective CRM solution must

- ✔ Be highly flexible to meet the needs of the business.

- ✔ Allow organisations to manage a wide range of entities, including not just customers but also leads, prospects, contacts and cases.
- ✔ Include automation of business processes related to customer management.

The result was a different kind of CRM that is highly flexible, automated, and customisable – in effect, a Relationship Management-based platform.

As businesses expanded their use of this different kind of CRM solution, they began to use them to manage a wider range of entities – not just customer relationships, but also asset management, prospect management, citizen management and many more. What began as a CRM solution was adapted to be the platform for multiple business applications built around core CRM capabilities.

This extension from customer-centric to X-centric applications is the origin of the term XRM. Table 4-1 summarises the differences.

**Table 4-1 Comparing CRM and XRM**

	<i>CRM</i>	<i>XRM</i>
<b>Definition</b>	C = customer; manage customers through the automation of marketing, sales and service processes	X = any business entity; make any business relationship through the automation of relevant business unit processes
<b>Used by</b>	Marketing, sales and customer service teams	Any team

	<i>CRM</i>	<i>XRM</i>
<b>To manage</b>	Customer relationships	Any relationship
<b>Automates</b>	Marketing, sales and service processes	Any business process
<b>Tracks</b>	Interactions, activities, tasks and 360° history of the customer	Interactions, activities, tasks and 360° history of X
<b>Provides</b>	Customer-centric analytics	X-centric analytics



Companies can use XRM in a wide range of management fields and processes, as VRM (Vendor), ERM (Employee), PRM (Partner), CzRM (Citizen) and so on.

## *Benefiting from Mobile CRM*

A Mobile CRM application offers the ability to provide robust CRM features that allows field workers, such as salespeople, service staff and support teams, to access and interact with customer data while they're on the road. Using smartphones, tablets and other Web-enabled handheld appliances, users can retrieve and update customer-related information from back-end systems, manage opportunities and jobs, process orders, check inventory levels and much more, just as easily as if they were in the office.



The Mobile CRM complements the CRM system used inside the organisation. You can have a CRM anytime, anywhere, on the move, so that you're nearer and nearer the customer.

## Taking Advantage of Social CRM

Social technologies, such as blogs, forums and social networks, are transforming the relationships between organisations and their stakeholders. Social CRM is the result of the convergence of social technologies with processes and technologies of customer relationship management.



Social media isn't restricted only to the well-known independent networks. Other kinds of communities, such as *internal communities*, relate to networks within organisations and allow new forms of communication and collaboration, with a greater responsiveness to the needs of the various stakeholders or interested parties. *Managed communities* associated with a brand allow interested parties to become involved with the organisation and each other in order to solve their problems and offer feedback. In this type of community, the organisation or brand has a greater ability to influence the formation of the message content and participation.

Recently, some researchers have addressed the integration of unstructured and structured social conversations about enterprise customers and the possible benefits. In fact, evidence suggests that the Social CRM can provide benefits such as the following:

- ✓ The possibility of supporting development of new products or services
- ✓ Better customer service
- ✓ Better identification of opportunities for cross-sell and up-sell



As such, the Social CRM solutions can provide new social collaboration capabilities that include activity feeds, microblogging, conversations, automated activities updates and mobile CRM activity feeds.





## Part V

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# Ten (Well, Nearly) Top Tips for CRM

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### *In This Part*

- ▶ Remembering keypoints as you use CRM
  - ▶ Choosing role models and professionals to help
- .....

**H**opefully, this book gives you a reasonable idea of what a modern operational CRM solution is, where it might fit in your organisation and where to start when it comes to defining and deploying a solution appropriate to your own needs. This part highlights tips to keep in mind as you embark on your CRM journey.

### *Try Before You Buy*

Take the opportunity of a free trial by playing around for a period of days and weeks.

Some partners and system integrators also provide these trials, and you should look for them to help you during the decision process. Get to know the functionalities available and how you're going to implement them in your organisation by priority need.

## ***Reflect and Analyze***

Think about how you feel about the accuracy of the opportunity pipeline. If you don't know with 80 percent probability the level of business that will be converted in your actual pipeline in the next 3 months, then you need a CRM urgently.

## ***Identify Organisations Using CRM***

Identify in your industry, locally and worldwide, which organisations have already implemented CRM and the benefits they got with it.

This step is important for setting up your business case. Eventually, you can benefit from a solution that is already proving itself in other customers.

## ***Avoid Dual-Systems Installations***

When it's done and in production, CRM is the only system to manage your customer contacts, history, cases, proposals, and so on. Using CRM alone gets your organisation faster results and return on investment.

## ***Identify Your CRM Champions***

Who are your early adopters – the ones that are always eager to try things first? These pioneers can be individuals or departments. They are the ones willing to use

CRM and are your best advocates in the organisation. These early adopters can teach and troubleshoot for the followers.

## ***Choose Professionals to Help You***

A partner or system integrator will be key for the success. A partner that supports you since day 1, even if it is still only a trial, will give you a faster payback.

## ***Ask for ROI and Payback Evidences***

Several studies on installations show that productivity gains of 10 percent, 30 percent and much more are easily achievable. Payback periods can be as low as a couple of months, and most will be less than a year. Convince yourself and your management that the benefit will be tremendous.

## ***Don't Tie CRM to Traditional Software Capital Investments***

Software as a Service (SaaS) solutions bring CRM into the field of operational costs, where you pay only for the people that use it and enjoy more flexibility regarding the way your organisation can grow or change the system according to the progression in the business.





# Exploit CRM for business benefit

## How can I benefit from CRM?

If you have a customer-centred culture, CRM is an invaluable tool for your sales, marketing and services organisation. Today CRM is easily accessible and it is no longer exclusive to large companies. Take advantage of easy to use, familiar interfaces and the 'software as a service' model which allows you to use and deploy it with great flexibility, and according to your business needs. In this short guide you get a summary of all the functionalities, advantages and benefits of implementing operational CRM in your organisation.

THE  
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WAY

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