

## **Advice on choosing a CRM Solution**

CRM solutions are designed to maximise sales and marketing effectiveness and increase satisfaction in an age where customers can interact with businesses in many ways.

Contacts can be personal with sales staff, through call centres, online stores, or email.

To get the most of the opportunities these customer interactions present, organisations need to coordinate the information gathered at customer contacts.

By being aware of all the previous interactions that a company has had with any given customer, the next time that customer interacts with the organisation, the company should be able to fully deliver on that customer's core expectations on one hand, and potentially drive revenue by selling complementary services and products on the other.

CRM solutions provide the software functionality to be able to integrate contacts and to analyse, process and report this information to sales and marketing departments at each customer contact. Thus organisations gain a personalised, or 'unified', view of their customers

When shopping for a CRM solution, consider these three important fundamentals

- 1) The solution fits your overall business strategy
- 2) The solution is easy to use.
- 3) The solution is easy to implement and can quickly deliver results

The best CRM solution is one that fits your existing business – taking into account things like your existing technology platform & the way your staff & customers currently interact.

In order to gain the most from any customer interaction (which is the whole point of CRM), the data gathered must be effectively integrated across the whole organisation

### **CRM integrated with ERP suite.**

A suite of this type is designed to be a good fit with the majority of transactions any business undertakes – which in many cases are common across an organisation regardless of the industry they're in.

### **Existing systems, your people, your customers**

The option you choose may actually be dictated by circumstances. For example, except in the case of a brand new organisation, all existing businesses will have some form of Accounting system in place.

So if, for example, most of your current ERP solution is Sage Accpac, then you'll probably want to investigate whether Sage's CRM module is capable of delivering on the key CRM

fundamentals for your business (fits your business strategy, easy to use & and will quickly deliver actionable data). Remember also, that a system that works with your current data and applications will help lower your implementation and support costs.

The purpose of CRM is to make your organisation more attractive to your customers, and you may be able to achieve this without a huge spend on advanced functionality by first understanding what your customers' expectations are. Be wary of 'over buying' and increasing the costs of your implementation beyond the point where the investment will ever pay for itself in increased business or efficiency gains.

While most CRM systems have a lot of functionality, experience has shown that a successful CRM implementation project is typically one that is managed in a staged approach – starting with 'core' CRM functionality that addresses the most frustrating issues facing the support, sales and marketing departments.

This approach ensures the vital buy-in right from outset of the end users of the system as they will gain immediately from the project. Thus, identifying what your 'core' issues are may make the 'what type of CRM solution?' decision for you.

## **Conclusions**

When looking at a CRM solution, it's critical to analyse your existing and anticipated business requirements or core service standards, then put a CRM strategy in place that meets those requirements. Evaluate your existing technology capabilities, map out the desired functionality, and then identify the technology needed to close the gaps between what already exists and what is desired. Once the potential requirements have been identified, they can be prioritised based on their impact and how they maintain the balance between product flexibility, functionality and implementation/integration costs.

The final step is to develop a business case that clarifies the estimated return from investing in new CRM technologies to achieve specific objectives.

Contact ERP Business Solutions Pty Ltd 02 99062122 or email us at [sales@erp.net.au](mailto:sales@erp.net.au)