



# What is CRM:

## The ultimate guide








# *What is CRM?*

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## CRM and ERP: It's time to fuel your business growth

Would you like a way of recording every interaction with customers?

Do you want team members in different departments in your company to be able to share information easily?

Is there a way you can use real-time information about your company's resources to accelerate sales?

In this eBook we explain how Sage CRM and Sage ERP can help your business become more productive, efficient and profitable.

First let's talk about Sage ERP.

As a Sage ERP customer, you're already on

the way to growing your business. According to a 2014 [report](#) by IDG Research Services, companies with more effective data grow 35 percent faster.

More effective data comes from using an ERP solution to standardise the sharing of business information across teams and to streamline business operations.

ERP provides you with powerful tools for managing your company's finances and staying compliant with government regulations.

Plus with the business intelligence tools of ERP, you can oversee operations across your entire company.

Using Sage ERP solutions you can connect different teams, gain greater visibility over finance and operations, share information and focus on running your business.

# What is Customer Relationship Management (CRM)?

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Anne Robinson is an IT director of manufacturing company Alloy Polymers. When asked how Sage ERP helps her business, she said:

“Nothing moves without being scanned. We maintain tight control of every order and every ingredient in our warehouse.”

“This control is even more important to us considering the materials belong to our customers. The real-time nature of Sage ERP X3 means we always have accurate data available to our customer service, accounting, and manufacturing departments.”

So, if ERP software helps directors like Anne focus on running a successful business, what’s the role of a customer relationship management solution?



## What is CRM?

CRM stands for customer relationship management, and it is a way of tracking and managing interaction with prospects, leads and customers as they move through every stage of a company’s sales cycle.

CRM software helps businesses improve customer relationships by organising and automating communications and activities across all customer-facing departments including sales, marketing and customer service.

CRM software provides a level of automation that enables businesses to run smoothly and efficiently. And, because every customer interaction is stored in the one place, you and your team can nurture these relationships at every stage. As a manager, you can also gain insight into how your sales and marketing campaigns are performing, helping you make more informed business decisions.



If ERP lets you focus on the running of your business, CRM helps you focus on customers.

# The 7 most useful features of CRM software



CRM software enables your marketing, sales and customer services teams to work together, to share information and to manage every interaction with prospects, leads and customers.

These are the seven most useful features in CRM software for small and medium businesses:



## 01. Contact management

CRM is built to manage your information about contacts. For each contact, you can store information like phone numbers, email and postal addresses. For example, a travelling salesperson can access this contact information using their mobile device before they meet or call a client.



## 02. Central database

CRM software helps you store your customer data in a central, secure location. This information includes email and communication histories, sales quotes, orders received, opportunities, and open and resolved support cases. And because this information is in one place, you can feel confident you're acting on up-to-date information.



## 03. Sales force automation

Using CRM, you can automate many of the day-to-day tasks that form part of the sales process including order processing, lead management and sales forecasts. This automation eliminates the need to spend time performing manual daily tasks like scheduling sales calls.



## 04. Leads and opportunity management

Using CRM software, your sales team can manage leads from first contact through to final customer acquisition. You and your management team can optimise sales resources and ensure your team members spend more time on profitable opportunities and less on administration.



## 05. Targeted marketing

A CRM solution helps marketing teams identify leads, opportunities and closed sales. They can use CRM to plan targeted campaigns and track these results in real-time. CRM also supports email marketing, which is a powerful strategy for telling customers about special offers and promotions.



## 06. Customer service

Customer service teams use CRM software to handle queries and complaints and resolve queries faster and more effectively with up-to-date information. They do this using tools like case management, service level agreement (SLA) tracking and a central knowledgebase. They can also use customer service metrics to improve the overall level of customer service.



## 07. Reports and insight

With CRM you can generate reports for key areas of your business including sales, customer service, lead reports, marketing and so on. You can even create tailored reports that measure how the business is performing against KPIs. These types of reports help managers evaluate where the business stands and make more informed decisions.

# Supporting your sales, marketing and customer service teams



Sales



Marketing



Customer Service

In most businesses, three key departments can benefit from a CRM solution. These include sales, marketing and customer service. In this section we will explain how these departments can use CRM and how it can help teams do their job better.

## PARS California, USA

A CRM solution helps you simplify the sales process, shorten sales cycles and make the most of every sales opportunity. CRM software automates sales tasks such as creating quotes and orders, forecasting sales, progressing leads and converting them to opportunities using sales workflows. Using Sage CRM and Sage ERP, your sales reps can then track orders in real-time.

### How PARS uses CRM for sales

PARS provides retirement services to public agencies in the United States. It uses Sage CRM to collect and retain business and customer data. Sage CRM has helped Public Agency Retirement Services double its sales and improve its reporting capabilities, and it is more efficient as a result.

“Over the last four years our company’s revenue has grown about 60 per cent and we would not have been able to do that without Sage CRM”

Karen Zfaty,  
Director of Marketing Information  
Systems, PARS



## How CRM enables you to market more effectively

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“All communications between prospects and clients are recorded in the CRM... the loss of customers reduced greatly and our marketing efforts achieved a much higher response”.

Astley Yip,  
Sales Manager, Nexus Solutions

## How CRM can help your business deliver exceptional customer service

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“We believe that we’re now one of the leaders in the industry in providing critical information to clients, instantly accessible whenever they want it. This helps us to win new business and enhance our service to existing clients.”

Simon Adcock,  
Managing Director, ATEC Security

### Nexus Solutions Singapore

Using CRM software, your marketing team can identify the sources of leads, opportunities and closed sales. They can also find customer information for upcoming campaigns and send targeted email marketing campaigns. When customers place orders for your products or services after these marketing campaigns, you can track these orders using your ERP solution.

#### How Nexus Solutions uses CRM for marketing campaigns

Established in 2001, Nexus Solutions provides integrated network communication infrastructure and internet security technologies to customers in Hong Kong, China, Taiwan and other Asian countries.

Prior to purchasing Sage CRM, Nexus Solutions struggled to create marketing campaigns with consistent objectives and targeted customer messaging. Sage CRM enables it to better understand customers, and a central database of customer and partner information means sales and marketing can collaborate on each campaign.

### ATEC Security Wolverhampton, UK

With CRM and ERP, your customer service teams gain powerful case management tools they can use to provide exceptional customer service. They can automate and manage the progress of customer service cases and resolve customer issues faster.

For example, a customer service representative can see when a replacement part is due in stock using Sage ERP, explain this to a customer and document this information in CRM.

#### How ATEC Security use Sage CRM for customer service

Since 1985, ATEC Security has been building its reputation as a leading specialist security and communications systems integrator. After a period of rapid growth, ATEC recognised the need for a solution that offered greater flexibility and control.

Sage CRM helped the company define, drive and optimise its business processes. Using the detailed reports within CRM, ATEC can now progress cases in real-time and report to clients with up-to-date information.



## Signs you really need a CRM solution

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If you're considering investing in CRM but aren't quite sure if it can help you, these 5 questions can help you decide if you will benefit from this solution.



- Do you ever get frustrated searching for customer and prospect information?
- Do you want to feel more in control of sales and marketing campaigns?
- Are your customer records safe and compliant?
- Could your team share ideas and information more efficiently?
- Is the process of generating business reports time-consuming?

Sage CRM is an affordable, intuitive and adaptable solution that over 15,000 businesses around the world use and depend on today.



# How to get the most from CRM



## Join 15,000 growing businesses

Using Sage CRM, our customers save time, increase productivity and gain greater visibility across the business. Additionally, thousands of Sage CRM customers have enjoyed increased sales and bigger business growth.

CRM software enables your marketing, sales and customer services teams to work together, to share information and to manage every interaction with prospects, leads and customers.

Sage CRM is an affordable and easy to use solution that over 15,000 small and medium sized businesses around the world depend on to grow their business.

Sage CRM customer PARS has doubled its revenue in the six years since purchasing Sage CRM and according to Karen Zfaty, Director of Marketing Info Systems, Sage CRM “has played a significant part”.

If you'd like to see what Sage CRM can do for you and your team, you can take a free 30-day trial of Sage CRM.

# 10 practical ways your business can get more from a customer relationship management (CRM) solution

01

Explain the benefits of CRM and encourage your team to use it to manage customer data



02

Review your company data, update your contact details and build quality customer lists.



03

Enter details of new business opportunities into your CRM solution



10

Record closed sales information, make better decisions and grow your business



06

Create, monitor and evaluate your sales opportunities



05

Collaborate with the rest of your team using shared calendars and tasks



04

Manage customer information on the go using mobile CRM



07

Assign values associated to each opportunity



08

Gain greater insight into your business using powerful reports



09

Use your sales pipeline to see what stage sales deals are at, to make accurate forecasts and to focus on the right leads



Start your free 30 day trial of Sage CRM today

sage



# About Us

Equation Technologies provides business management solutions for mid-sized companies in the USA and Canada. We make carefully crafted recommendations from among the industry's best-performing ERP software, including Sage Intacct and Sage 300. We help you [reduce the risk in choosing and implementing solutions](#) by:

- Listening closely to your challenges and exactly how your business works.
- Developing processes that match your business, not requiring you to conform to a software system.
- Mapping out efficiencies using technology to improve operations without adding staff.

Our main goal is simple: have a clear understanding of our clients' goals. We believe the only way to sufficiently grasp that information is by listening first, and offering valuable advice later. We also know that one single approach is not right for all businesses. We leverage our team's vast education and business experiences across industries to focus on our clients' unique needs. We understand the importance of your business. We know when you call on us, time is of the essence and we value & respect your time.

Sage energizes the success of businesses and their communities around the world through the use of smart technology and the imagination of our people. We are reimagining the business of doing business and bring energy, experience and technology to inspire our customers to fulfill their dreams. We work with a thriving community of entrepreneurs, business owners, accountants, partners, developers and 3rd party service providers who drive the global economy. From social accounting apps to enterprise-class software, millions of businesses use Sage to transform the way they work. We are a FTSE 100 company with 13,000 employees in 23 countries. For more information, visit [www.sage.com](http://www.sage.com).

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