

Does This Keep You Awake at Night?



Do the following situations keep you awake at night?

1. You just found out that your marketing department ran a campaign last quarter and generated hundreds of leads, only you just found out the leads never made it to the right sales representative for follow-up and you have a new campaign starting later this month.
2. You just found out one of your long time customers has cancelled a major order. After calling the customer to understand their decision you discover that your sales representative was unaware of a frustrating problem the customer was having with the service department. Normally, this would not be an issue because your sales representatives call the service department before they call on their customers. However this week the service manager was away on vacation and the new service representative didn't know this was a loyal customer that had committed to purchase more products. Since your systems are not linked and there is no automated way to escalate problems, you have lost one of your major customers.
3. You just committed to a growth plan for your business and have begun a hiring plan aimed at developing the capacity to service your customers. To date you sales have been strong and consistent and your sales team has been able to make their quarterly targets, however with the increase investment in capacity it is imperative you have a visibility into your sales pipeline to ensure your company stays profitable.

If these situations sound familiar, a CRM solution might be in your future.

What CRM Can Do for Your Business

Customer relationship management software delivers sales, service and marketing insights.

Small business has always been about customer relationships — about knowing names, knowing preferences and offering the kind of friendly service that keeps customers coming back.

But as a business grows, that ability to relate on a personal level to each and every customer becomes more of a struggle. The owner or executives may be more involved in operations, less involved with customers. Managers may spend more time handling employee issues and less time interacting with customers.

Yet effectively managing those customer relationships is a key to profitability and customer loyalty. So the question becomes: How does a small business know when it's time for a more sophisticated method of managing customer relationships?

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Benefits of CRM

There comes a point in an organization's development, however, when sharing customer information across teams or departments makes more sense strategically and also offers greater efficiency as the number of customers increases.

There is an array of business software available today that collects key customer information — sales history, preferences, contact details and more — and serves it up in a way that is both useful and more easily managed. This type of software is commonly referred to as customer relationship management — or CRM. In the last decade, CRM has become a major focus of many enterprise businesses.

But a growing number of small and mid-sized businesses are also realizing that CRM makes sense — especially with the introduction of CRM software designed specifically for smaller operations.

These software solutions help in the following ways:

- Employees can quickly assign, manage and resolve incidents with automated routing, queuing and service request escalation.
- Reports help identify common support issues, evaluate customer needs, track processes and measure service performance.
- Employees can easily share sales and order information as well as support information and use it to identify top customers and prioritize service needs.

From a sales perspective, some of the other benefits these solutions offer are:

- Access to a centralized, customizable view of sales and support activity along with complete customer history either online or offline and from any location using a Web browser.
- Shorter sales cycles and improved close rates with tools that enable lead and opportunity management, workflow rules customization for automated sales processes, quote creation and order management.
- Comprehensive reports that forecast sales, measure business activity and performance, track sales and service success, as well as identify trends, problems and opportunities.

Sales force automation and after-sales customer service and support may not be relevant for every business. But the advantages of data mining, which helps surface cross-sell and up-sell

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opportunities, have universal appeal. Still, that doesn't mean CRM is for everyone.

Is CRM for You?

The benefits of a CRM solution that integrates with your existing applications are easy to understand. The tougher issue is determining whether your business is ready to move to a CRM system.

Although these solutions are priced for small and mid-size businesses, that doesn't mean every business is going to get a reasonable return on a CRM investment. For instance, these factors may suggest that CRM solution may not be appropriate for your operation:

- All of your customers tend to be similar
- You have a very limited number of products or services
- Your product or service is long-lasting
- All of your customer contact is through one very simple process

On the other hand, these factors may indicate you should consider a CRM solution for your business:

- Your core customers have very different characteristics
- You sell a large assortment of products and services
- Customers replace or add to the products or services you sell on a regular basis
- You interact with customers in a variety of ways, such as in-person, online and/or over the phone
- You have multiple offices and/or mobile workers and need to easily share and manage customer information from all sources

Perhaps the most critical issue that points to a need for a CRM solution goes back to the beginning: Small and mid-sized business has always been about customer relationships — knowing who your customers are, what their preferences are and how you can keep them loyal and coming back.

You have done a lot to ensure the success of your business, but how can you make sure everyone is on the same page and positions for future success?

We work closely with Microsoft Dynamics CRM to create a custom solution for you company. With our strategic and integration experience to complement Microsoft Dynamics CRM, you'll have a solution that can be quickly implemented to help increase productivity and profits. And

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because it acts as an extension of familiar applications like Microsoft Office and Outlook, your people can begin seeing results in a shorter amount of time.

Is customer loyalty worth a call? Call us at 401-423-2583 and we will conduct a free phone assessment to see if Microsoft Dynamics CRM can help.

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