

CRM Expert Advisor Guide

Guide to CRM (Customer Relationship Management)?



Maximizer Software
Simply Successful **CRM**

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What is CRM (Customer Relationship Management)?

Introduction

CRM (customer relationship management) is an information industry term for methodologies, software, and usually Internet capabilities that help an enterprise manage customer relationships in an organized way. For example, an enterprise might build a database about its customers that described relationships in sufficient detail so that management, salespeople, people providing service, and perhaps the customer directly could access information, match customer needs with product plans and offerings, remind customers of service requirements, know what other products a customer had purchased, and so forth.

According to some industry views, CRM consists of:

- Helping an enterprise to enable its marketing departments to identify and target their best customers, manage marketing campaigns with clear goals and objectives, and generate quality leads for the sales team.
- Assisting the organization to improve telesales, account, and sales management by optimizing information shared by multiple employees, and streamlining existing processes (for example, taking orders using mobile devices)
- Allowing the formation of individualized relationships with customers, with the aim of improving customer satisfaction and maximizing profits; identifying the most profitable customers and providing them the highest level of service.
- Providing employees with the information and processes necessary to know their customers, understand their needs, and effectively build relationships between the company, its customer base, and distribution partners.

What is CRM?

The simplest, broadest definition can be found in the name: CRM is a comprehensive way to manage the relationship with your customers — including potential customers — for long-lasting and mutual benefit. More specifically, modern CRM systems enable you to capture information surrounding customer interactions and integrate it with every customer-related function and data point.

Strategy First. Technology Second

The key to successful CRM is a customer-centric business philosophy and culture that ensures every company activity serves a customer need. CRM isn't all about the technology. Rather, the right CRM technology turns proper strategy into desirable results. First, you analyze the quality and effectiveness of your existing customer-related processes — then eliminate, update, redesign, and create as necessary before you implement any software. You cannot automate your way out of bad processes.

Who Benefits from CRM?

CRM can benefit virtually all departments within a business, including sales and support, finance, forecasting, human resources, manufacturing, R&D, and logistics.

CRM in the Real World

Good CRM isn't easy. Changing a culture and entrenched ways of business takes top-to-bottom determination. Existing processes must be scrutinized; even sound processes may need to be overhauled to accommodate new CRM information.

Although software applications are used to gather and disseminate customer information to all involved, make no mistake — CRM is more than technology. It's a complete back-to-front company operation involving the executives that must support it, the people that will implement it, and the technology that will make it work.

Is CRM Right for You?

CRM can mean increased customer loyalty and profitability. But that path involves top-to-bottom buy-in; analysis and redesign of existing processes to accommodate reams of new information; and implementation of whatever new technology is required. Depending on the size of the company, this process can take a few weeks to a year or more, and involve simple Web-based programs to multi-million dollar installations.

CRM: The Payoff

On the plus side, customers with successful CRM systems report higher profits; lower costs to attract and retain customers; greater customer loyalty; and smoother, more streamlined workflows. Specific benefits cited include:

- More timely and targeted customer services
- Increased per-customer revenues
- Greater cross-sell and up-sell success
- Trimmed sales cycles
- More-efficient call center operations
- Improved sales forecasting
- Fewer customer problems
- Better-informed marketing decisions
- Lower cost of sale

According to analyst AMI Partners- organisations using CRM solutions on average have double the revenue of similar organisations not using a CRM solution.

About Maximizer Software

Maximizer Software is a leading provider of simple, accessible, customer relationship management (CRM) solutions, providing the best value for small and medium-sized businesses. Built on a web-based architecture, Maximizer CRM offers sales, marketing, and customer service users and managers their choice of access to customer information – through the desktop, web, or mobile device. Maximizer Software has sold more than one million licenses to over 120,000 customers, ranging in size from entrepreneurs to multinational organizations, including: Siemens, Société Générale, HSBC, TD Securities, Lockheed Martin, Brian Tracy International, Fisher & Paykel Healthcare, Oxford University Press, and Cathay Pacific. Maximizer Software is a global business with offices and over 400 business partners in the Americas, Europe/ Middle East/Africa and Asia Pacific.

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