



QUICK GUIDE

In plain English ...

Why do it?

Who uses it?

Is it for my business?

How much does it cost?

In plain English ...

...Customer Relationship Management (CRM) software applications are designed to manage the whole process of interacting with your customers.

Acting as the single repository of customer information, a good CRM solution will help your business take full advantage of the value of its customer base and relations. Typically CRM systems are designed to address three key areas:-

- Sales
- Marketing
- Customer Services & Management

Why do it?

If you understand your customer's needs you're more likely to continue to do business with them. A good CRM system, such as **Microsoft Dynamics CRM**, enables an organisation to maintain a complete 360° view of their customer's activities and preferences. This includes tracking addresses and contacts, order history and customer interactions such as telephone calls, emails and letters. By having this information stored in one place your sales team can improve their win rates



by exploiting the knowledge already held within your organisation to target the right customers with the right products at the right time. The CRM system can also be used to shorten the sales cycle and drive best practise by automating 'admin intensive' parts of the process such as lead routing, territory management and sales order processing.

As well as the huge improvements a CRM system makes to the day to day management of the sales process, it will also deliver critical sales intelligence to senior management. By taking advantage of the customer and prospect data held within the system it's easy to analyse buying trends, lead conversion rates, individual sales performance and pipelines.

You'll also be able to run far more effective marketing campaigns by using this data to produce targeted communications about specific products and services to the right prospects.

Managing customer contracts? A CRM system provides the perfect platform to deliver outstanding levels of customer service. Users can create, assign and manage customer cases from initial contact through to resolution, ensuring that you meet your agreed service level commitments and where appropriate, bill customers in a timely *and* accurate manner.

Who uses it?



Any organisation that wants to maximise their ability to retain and grow their customer base. In fact you're probably already using some form of CRM application within your organisation right now – this year it's expected that five times as many companies will be looking to *replace* existing CRM systems than implement one for the first time.

Is it for my business?

- Can people in my organisation find contact information, order details, previous quotations along with historic emails and letters for **all** my customers at a moments notice?
- Can I easily analyse my customers and prospects to gain insight into their particular requirements and buying habits?
- Can my organisation maximise the revenue potential of its customers and prospects by easily contacting the right people at the right time with the right message?
- Are customer problems and requests dealt with efficiently - can everyone who talks to customers in my organisation easily access critical information about outstanding issues?

If the answer to any of these questions is no, then you should consider looking at a CRM solution.

In June 2009, Nucleus Research, a global research and analysis organisation, published a report on the tangible benefits companies achieved by using a **Microsoft Dynamics CRM** application. The report highlighted the following improvements:-

- **7% -15% improvement in sales productivity (more if moving from 'paper-based' systems)**
- **Up to 15% improvement in customer service productivity**
- **8% increase in marketing efficiency**

How much does it cost?

Well of course it depends what your specific requirements are. Typically one of our Business Analyst's will work with your organisation to identify your needs and match these against the core functionality of Dynamics CRM. Any requirements which are outside the scope of the standard product will then be specified and costed. **Don't panic!**

Microsoft Dynamics CRM has been specifically designed to allow software engineers to add powerful additional functionality at a fraction of the cost of traditional development methods. In fact, Dynamics CRM is fast becoming the *application platform* of choice for organisations of all sizes who are looking to develop line-of business applications in a timely and cost effective manner (see our xRM page for more details).

Finally, we'll work with you to identify the most appropriate method of delivering the system to users within your organisation. This may be by installing the system 'on-premise' to maximise the return on investment in your existing Microsoft software.

Alternatively, the system could be delivered via a hosted model where the application and data resides on a remote server and is accessed via the web (see our page on Cloud Computing for more details).

KNOW MORE

Want to know even more? Contact one of our team today to benefit from a free consultation:

Call: +44(0) 1223 834333
Email: info@softwerx.com
Search: www.softwerx.com

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