



**8 REASONS CRM IS FAR
MORE THAN JUST A SALES TOOL**

Why do you need another business tool?

Good question.

Implementing the right Customer Relationship Management (CRM) solution in your business will lessen the administrative workload and prioritise communication and follow-ups to ensure no customer service query or potential sales lead falls through the cracks.

A CRM solution helps consolidate the information that comes from multiple communication channels so that each interaction with your customers is responded to and dealt with timeously.

It improves customer support and staff accountability.

Why CRM?

A CRM tool also enables you to create reports from its data, highlighting trends and areas of weakness, improving efficiency and boosting profits.

In short, CRM is not merely focused on sales – it offers a strategic approach to enhance productivity across your staff complement and can make a difference to your bottom line by building better relationships with your clients, based on their needs and behaviours.

53% of top-performing companies are using CRM to boost sales productivity, according to a recent study conducted by Brainshark and Forbes Insights.



What can CRM do for you?

Email, phone, Facebook, LinkedIn, Twitter... these are just a few of the channels your customers can contact you on. It's easy for potential leads or customer complaints to fall through the cracks if these channels aren't monitored daily.

Consider this: CRM automatically stores a complete communication history allowing you to easily and efficiently track leads and customer service information on any device. CRM enables your business to be more responsive to the needs of your clients, offering them a better experience.



More reasons to use a CRM tool

Satisfied customers due to a better understanding of their needs

Targeting which customers would benefit from cross-selling of other products

Retaining customers who also become brand ambassadors for your company

Improved efficiency and productivity

Lower support and service costs

Improved sales due to targeted marketing campaigns

Being able to identify and sell to your most profitable clients

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“Using CRM our customers have not only been able to address their sales cycle needs but have also been able to address communication gaps within their organisation. They’re now able to request and action deliverables within a system which allows management to have a holistic view of projects. Response times can now be measured and users are not able to deny receiving required information or tasks as the system stores a full audit history of all actions performed within the system. This translates directly into improved efficiency and lowers risk.”

– **Devon Rimmington,**
Director at Brilliant Link



1. Enhanced flexibility

You're a go-getter and hungry to see your business grow. Which means you don't have hours to spare each day to deal with admin while those sales are waiting to be made. A cloud-based CRM system streamlines the administrative tasks while providing the transparency needed in terms of your sales and financial information.

Better yet, this means you're not tied to your desk as your CRM data is accessible anytime, anywhere, whether you're a customer service manager or a sales representative.

30% of marketers say having disparate data sources is the main reason they cannot glean useful insights from customer data. – Cyber Sphere Security

2. Make the right sale

Chasing potential sales that disintegrate into thin air is not only frustrating but can cost your sales team time, which could be better spent closing deals with clients who are already interested.

Through identifying these qualified leads and following up on them, **your sales staff can maximise their time and optimise their sales performance.**

Open opportunities translate to better sales and increased profit, and your CRM software pinpoints these potential clients for follow up.

Sales reps saw productivity increase by 26.4% upon adding social networking and mobile access to CRM application.

- Nucleus Research

3. Increase responsiveness

CRM offers a **complete view of each customer** at the touch of a button, including their history and information. Knowing precisely what prior interactions a customer has had with your company saves you time and money, as well as improves customer communication.

Your customer service staff can also share a central solution database within your CRM software to resolve issues speedily and respond to FAQs.

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“Implementation of Sage CRM has meant that we could take advantage of the lead-generating power of social media. Leads can be generated automatically and assigned to agents but the most important aspect of this functionality is that customer behaviour can be tracked and monitored. This enables us to be more reactive to customer needs.”

- **Erneil Janse van Vuuren,**
Sage ERP consultant at Brilliant Link



4. Retain happy customers

Dealing with an unhappy customer? Be proactive.

By using your CRM tool, you can easily identify which customers need support or quotes and you can follow up on potential leads. The level of service customers get from you determines whether you retain their business or not and also whether they will recommend your product or service.

Use your CRM solution to enhance your customer service offering and adhere to the conditions of your service level agreements. A CRM solution enables you to provide prompt responses to issues and ensure your customer information and transaction history is easily accessible. This way you can process and resolve any customer queries or issues within a specified timeframe.

And CRM integrates with email, so you'll be able to record all communication related to the issue.

According to a Global Customer Service study, three out of four consumers say they spent more money with a company because of a positive customer experience.

5. Create effective marketing campaigns

Be on the ball with strategic marketing campaigns.

Are your marketing campaigns and strategies bringing in new opportunities? Knowing how your leads were generated will give you insights into which marketing tactics are effective and how to target your campaigns. Your CRM tool enables you to generate email campaigns to follow up on potential leads or stay in touch with new customers.

You can easily view how successful your email campaign has been by tracking responses and the number of opens.

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“With Sage CRM we’ve been able to implement call logging in our support department. This has allowed us to address customer support calls efficiently and provide feedback to clients fast. Not only does this meet our customer’s needs but streamlines our internal processes ensuring accurate billing and effective resource management.”

– **Devon Rimmington,**
Director at Brilliant Link



6. Set KPIs

Measure growth and track metrics easily.

Set targets for your team using your CRM software. Creating KPIs for staff members becomes effortless, enabling your managers and HR teams to track a staff member's performance. You can also monitor your staff activities easily.

Keep your finger on the pulse and know where your team will be by syncing their calendars so you know who is available at any given moment.

7. Get valuable insights

Can you accurately track and analyse your sales data for the past few years? If not, it's high time to consider investing in a CRM solution which offers a drill-down functionality into sales performance.

Tracking metrics will give you direction for the future.

You can maintain an accurate view of your sales at any time, both actual sales as well as expected revenue in the form of forecasted sales. Know whether your team is achieving their sales targets for the month and track which sales reps are underperforming and who may need additional training.

Only 47% of all companies have a CRM system. – Smart Insights

8. Compile reports

Doing the same thing will always provide the same result. Are your efforts bringing the rewards your company needs? Reports are vital in establishing where your efforts are paying off, increasing profitability.

For that reason, compiling reports assists in **determining trends and conceptualising new strategies** going forward. Knowing where you stand on sales, productivity, marketing and ROI gives you the necessary information to make informed decisions.

Did you know?

- You can use a CRM tool like Sage CRM, to:
- Track company activities using comprehensive yet easy to understand dashboards
- Analyse and track your company's financial data
- Place supplier transactions on hold or perform inventory price enquiries
- Graphically view and drill down into your financial data with Visual Reports
- Easily set KPIs and track sales performance with a customisable executive dashboard
- Email PDFs and quotes quickly and easily in the cloud to follow up on leads
- Integrate easily with MailChimp to send and track targeted email marketing campaigns
- Access your key CRM information on mobile devices on the go
- See case volume using Company Cases, which tracks open cases, as well as their distribution across the client base
- Trace where your leads were sourced, as well as the volume your sales staff is handling with the Leads Generated by Source dashboard

Complete data security with Sage CRM

Safe and secure, 24/7.

With Sage CRM's enhanced security features, including integrated biometric and RFID sign-on features, you can be assured your data will remain protected.

[Sage CRM](#) is a scalable solution that can be adapted to suit your needs. Plus, it's quick to implement and roll out across your company.

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“Sage CRM is more than just a sales tool. It’s a business platform that enables organisations to leverage information. This means more informed and accurate decision-making moving the organisation into the future, creating a healthier business and lifting profits.”

- **Erneil Janse van Vuuren,**
Sage ERP consultant at Brilliant Link



What's the next step?

As a Sage Super Platinum Business Partner, Brilliant Link is a **trusted implementation specialist**.

We can arrange for one of our consultants to do a Sage CRM demonstration at your premises – simply call 086 111 1025 or email admin@brilliantlink.co.za. Would you like to implement Sage CRM in your business? [Call us today](#) for a quote!

Want to be the first to receive helpful tips, insights as well as discounts on Sage Evolution software? [Sign up for Brilliant Link's newsletter now](#).

