

# An Introduction to the World of CRM



Lupo Digital Helps Grow Organisations by Transforming How They Attract, Engage and Delight Their Customers

**Lupo Digital**  
Empowering world class, sales, customer  
success and marketing growth™

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# UNDERSTANDING CRM

## CRM IN 2018

**A CRM will bring structure and uniformity to the sales team, creating a self-sustaining sales ecosystem and makes the job much easier for human relationship building.**

## WHAT IS CRM?

CRM stand for customer relationship management, and it refers to software that helps companies track interactions with their future and current customers.

The goal of implementing a CRM is to create a system that your sales and marketing teams can use to more efficiently and effectively to interact with prospects or customers.

Marketing will often use a CRM to ensure that they're passing the right leads to their sales team - a key aspect of developing a strong relationship with the sales team. Salespeople utilise the CRM in a different way. They use it to source prospective customers, communicate with them, and track their interactions over time.

Having the entire prospect history in one place increases their efficiency and improves their productivity. For instance, salespeople using a CRM won't have to hunt through their email to remember where a conversation left off.

## WHO NEEDS CRM?

**Two groups of companies that see the most benefit from CRM tools:**

- 1 B2B companies that typically need to track leads and customers across long sales cycles and through upgrade paths (e.g., a finance company, a recruiting firm, manufacturer)
- 2 Considered purchase B2C companies (e.g., a jeweler, a landscaping service, or home buyers – the list goes on)

“

**71% of sales manager say that using a CRM helps drive and increase sales.**

*HubSpot Research*

# CAN CRM HELP YOUR BUSINESS?

What challenges do CRM systems aim to solve:

Do you have a need for maintaining a central list of information on your leads and customers? Does this information live in many different places?

Q1

Are your customers regularly interfacing with multiple people on your team? How does everyone keep track of where the conversation with any one customer left off?

Q2

Do you struggle to understand the productivity of your salesteam? Does your sales team follow a structured process?

**If you answered yes to any one or more of the above questions, chances are your business could benefit from a CRM system.**



## 4 BENEFITS OF CRM



### 1. BETTER LEAD INTELLIGENCE FOR BOTH MARKETING AND SALES

**There are many things a CRM can do that should get marketers, salespeople, or business owners pretty excited! Here's how a CRM can make you a more effective marketing and sales machine...**

Wouldn't it be helpful if you knew when a potential customer was looking at your website? Implementing a CRM will allow your sales team to know how many times potential customers have visited your site or if they have ever talked to a member of your sales team.

When a salesperson works within a CRM that integrates with their company's marketing software, they're able to access this type of detailed, real-time lead intelligence all from one place.

And this isn't just beneficial to sales; it's beneficial to marketing as well. A CRM will allow your marketing team to see which leads turn into customers. More specifically, you can see what brought them to your website and what pages they looked at before becoming a customer.

When a marketer works in a marketing platform that is integrated with a CRM, they are able to figure out which of their efforts are working best.

“

**CRM systems improve customer retention by 27%**

*HubSpot Research*



# 4 BENEFITS OF CRM



## 2. BETTER SALES AND MARKETING (SMARKETING) ALIGNMENT

Sales and marketing both have numbers they need to hit each month, and when both teams have visibility into one another metrics they can easily assess each team's progress and identify and remedy problems early on in the month.

Real-time reporting holds both teams accountable to their goals and helps one another work together toward shared outcomes. (It's also worth noting that CRMs are used for customers, too, not just leads; so customer service communications and metrics can be easily documented for account managers to reference as well.)



## 3. HELP SALES PRIORITISE IT'S PIPELINE

A CRM not only gives complete visibility into the sales pipeline, but it also helps sales people prioritise who to call first so they don't miss important opportunities. When sales and marketing set up a CRM, they can identify important criteria and even implement a lead scoring system. Organisational systems like these reduce time spent sifting through leads, and enable salespeople to prioritise the best opportunities.



## 4 BENEFITS OF CRM



### 4. CLOSED-LOOP REPORTING LETS MARKETERS IMPROVE CAMPAIGNS

When you integrate marketing software with your CRM, marketing can easily analyse the effectiveness of its campaigns using closed-loop reporting. For example, when a salesperson converts a lead into a paying customer, he or she can mark it in the CRM, and it will automatically be noted in your marketing software, too.

**This allows marketing to do two important things.**

- 1 First, marketing can automatically remove this lead for their nurturing sequences, and instead send it customer-focused information.
- 2 Secondly, marketing is now able to attribute this new customer to a specific campaign and channel. Mapping marketing activities to sales events is critical for marketing to improve future campaigns.



# 9 MUST HAVE CRM FEATURES

**Before all else, a CRM system should be useful to its end users: salespeople, sales managers, marketers, and business leaders. CRM systems have a range of functionalities, but these nine features are must-haves for any business that is aiming to organize their systems and improve their efficiency.**

## ● CONTACT MANAGEMENT

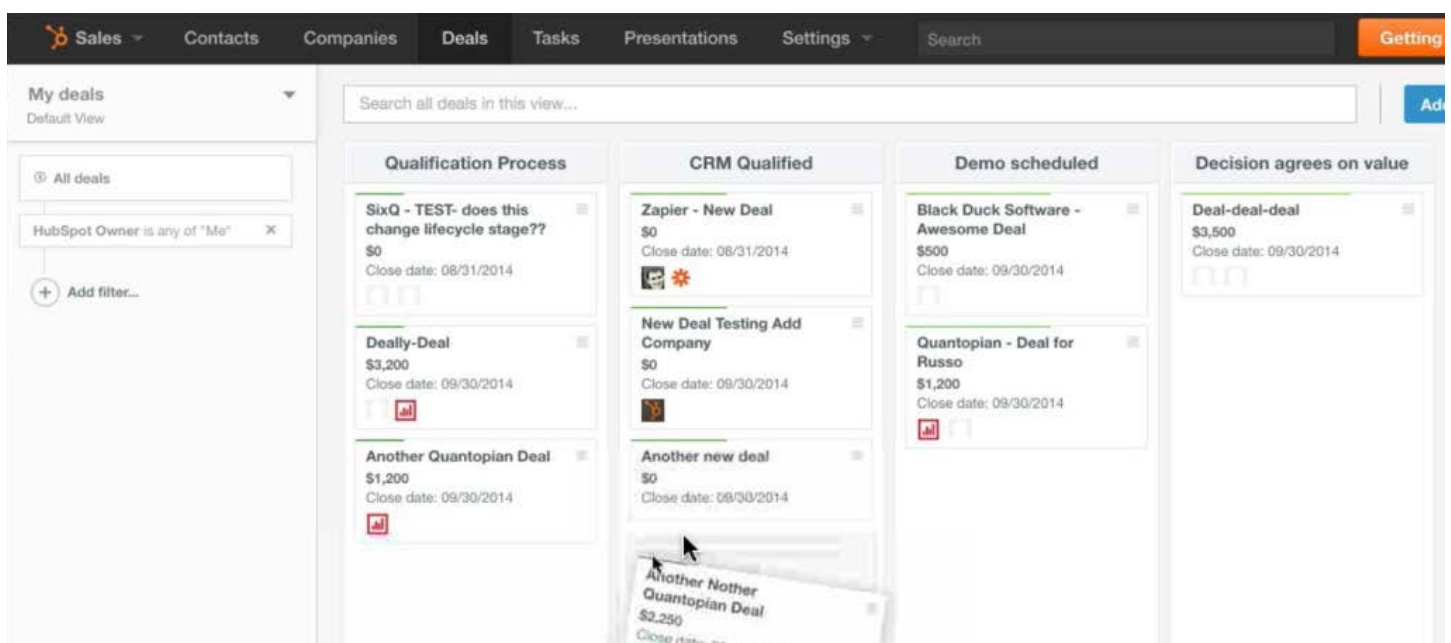
You won't find a CRM that doesn't have a contact management capability. If you do, chances are you aren't looking at a CRM. All CRM systems allow salespeople to create contact records and store prospect and customer information in a database. However, the best systems that truly improve efficiency will reduce and streamline contact data entry as much as possible.

**Judge this feature with ease of use in mind.**

## ● DEAL STAGES

Most CRM systems can be customized to operate on a specific sales process. Whether your company has three deal stages or 15, you should be able to program these levels into the software and attach associated values. It should also be easy to move a deal along the sales process, from one stage to the next. In HubSpot CRM, advancing a deal is as simple as dragging and dropping:

**Make sure the system you are using can be customised to your needs with ease.**





# 9 MUST HAVE CRM FEATURES

## ● DAILY DASHBOARD

Sales people need visibility into a number of metrics on a daily basis. Metrics such as their progress to date against quota, how many deals they have in their pipelines at which stages, and what outstanding tasks they need to complete. Similarly, sales managers and leaders need to be able to view these categories for the aggregated sales team.

**Evaluate this function based on visual appeal and simplicity.**

## ● TASK MANAGEMENT

A sales person who has to toggle back and forth between several different systems to view and complete their daily tasks is not a happy person (though this is common). CRM systems that include task management capabilities streamline salespeople's day-to-day workflow and help them keep on top of their follow up.

## ● CONTENT RESPOSITORY

To cut back on wasted time searching for content, look for a CRM system with an embedded content repository. Look for a system that allows salespeople to save their go-to pieces of collateral in one place. And it's not just collateral. Writing email copy can be another time suck for a busy sales person. Look for a system that also allows the user to file away customised email templates, so the sales rep is not reinventing the wheel with every new outreach.

“**Salespeople spend 31% of their time hunting for or creating content**

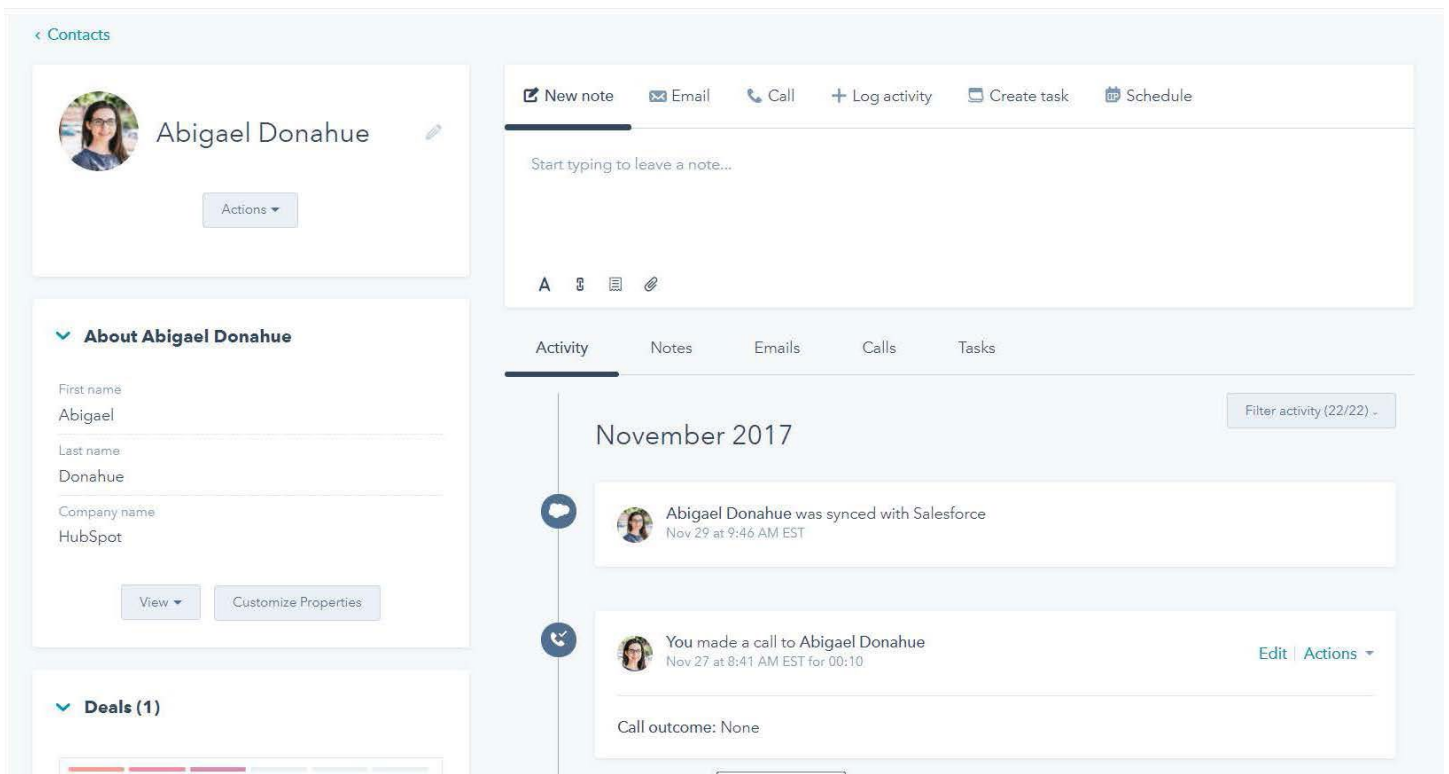
*DocuReted State of Sales Productivity Study*

# 9 MUST HAVE CRM FEATURES

## AUTOMATED DATA CAPTURE

One of the primary reasons companies decide to adopt a CRM is to keep better track of customer and prospect touches (emails, calls, etc). But, beware: Many CRM applications require salespeople to copy and paste their email outreach into the system or even upload call recordings.

These extra steps can be maddening for salespeople who are making 50 or 100 calls every single day, and it leaves room for human error. Look for a software that does this step automatically. HubSpot CRM automatically logs calls made and emails sent, and posts them in a timeline-like view on a contact's record page:



The screenshot displays the HubSpot CRM interface for a contact named Abigail Donahue. On the left, there is a sidebar with the contact's profile picture, name, and a section titled 'About Abigail Donahue' containing fields for first name, last name, and company name. Below this is a 'Deals (1)' section. The main area on the right shows a timeline of activities. At the top, there are buttons for 'New note', 'Email', 'Call', '+ Log activity', 'Create task', and 'Schedule'. Below these is a text input field for notes. The activity timeline is titled 'November 2017' and includes a 'Filter activity (22/22)' button. Two activities are visible: 'Abigail Donahue was synced with Salesforce' on Nov 29 at 9:46 AM EST, and 'You made a call to Abigail Donahue' on Nov 27 at 8:41 AM EST for 00:10. The call activity shows a 'Call outcome: None'.

## 9 MUST HAVE CRM FEATURES

### ● REPORTING

A CRM system is only as good as the insights it provides. Be sure that your CRM provides reporting features that make it easy to export and distribute the trends that the system reveals.

### ● MOBILE

Sales reps have seen productivity increased by 15% when they had mobile access to CRM applications. Tying reps to a CRM system that can only be accessed via laptop is bound to annoy them, especially if they're in a role that requires travel. The majority of CRM systems today allow salespeople to log on to the application from mobile devices such as tablets and smartphones -- make sure the ones you're considering do as well.

### ● INTEGRATION WITH MARKETING AUTOMATION

And last but not least, integration between your marketing and sales platform is crucial. After all, the underlying concept of "customer relationship management" is to provide a complete lifecycle view into each prospect and client. A gap between marketing automation and CRM can lead to lost information and lost opportunities.

## Here are some of the marketing automation software solutions available:



HubSpot is the biggest provider of marketing automation software worldwide.



Eloqua is an enterprise-level marketing automation suite owned by Oracle.



An affordable marketing automation platform that is relatively new on the scene.



Silverpop originally focused on email marketing and has progressed to include marketing automation.



A corporate marketing automation platform that also allows you to manage other parts of your marketing strategy, such as event management.



Pardot is owned by ExactTarget, who is in turn owned by Salesforce.com. Pardot is the leading marketing automation provider in Europe.



# HOW LUPO DIGITAL CAN HELP YOU

## We're CRM and Sales Enablement specialists.

To reap the full benefits of a CRM, you have to: choose one with the features that are right for your business today and that can grow with you as your business evolves.

Think about your company's growth goals, and consider both your short-term and long-term needs when investing in a CRM platform. Keep in mind, a CRM is not only a financial investment, it is also a time investment for your sales and marketing organisation.

Picking the right system, implementing it, and enforcing best practices around its usage will pay dividends as your company continues to grow and scale.

A specialist digital sales and marketing growth agency providing data driven results, leveraging technology and automation, to effect growth and digital transformation.





# CONTACT US

**We create digital marketing machines to grow your business.**

Lupo Digital isn't just a digital marketing and lead management service provider. We also offer full digital business solutions. We can build back-end integration and full customer experience solutions.

**GET IN TOUCH**



**Interested? We'd love to hear from you.**



**Email Us**

[info@lupodigital.com](mailto:info@lupodigital.com)



**Call Us**

1300 727 569  
Mon-Fri 9 am-5 pm (EST)



**Find Us**

Level 4, Pacific Highway  
St. Leonards, NSW 2065

*Empowering world class, sales, customer success and marketing growth™*

[www.lupodigital.com](http://www.lupodigital.com)



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