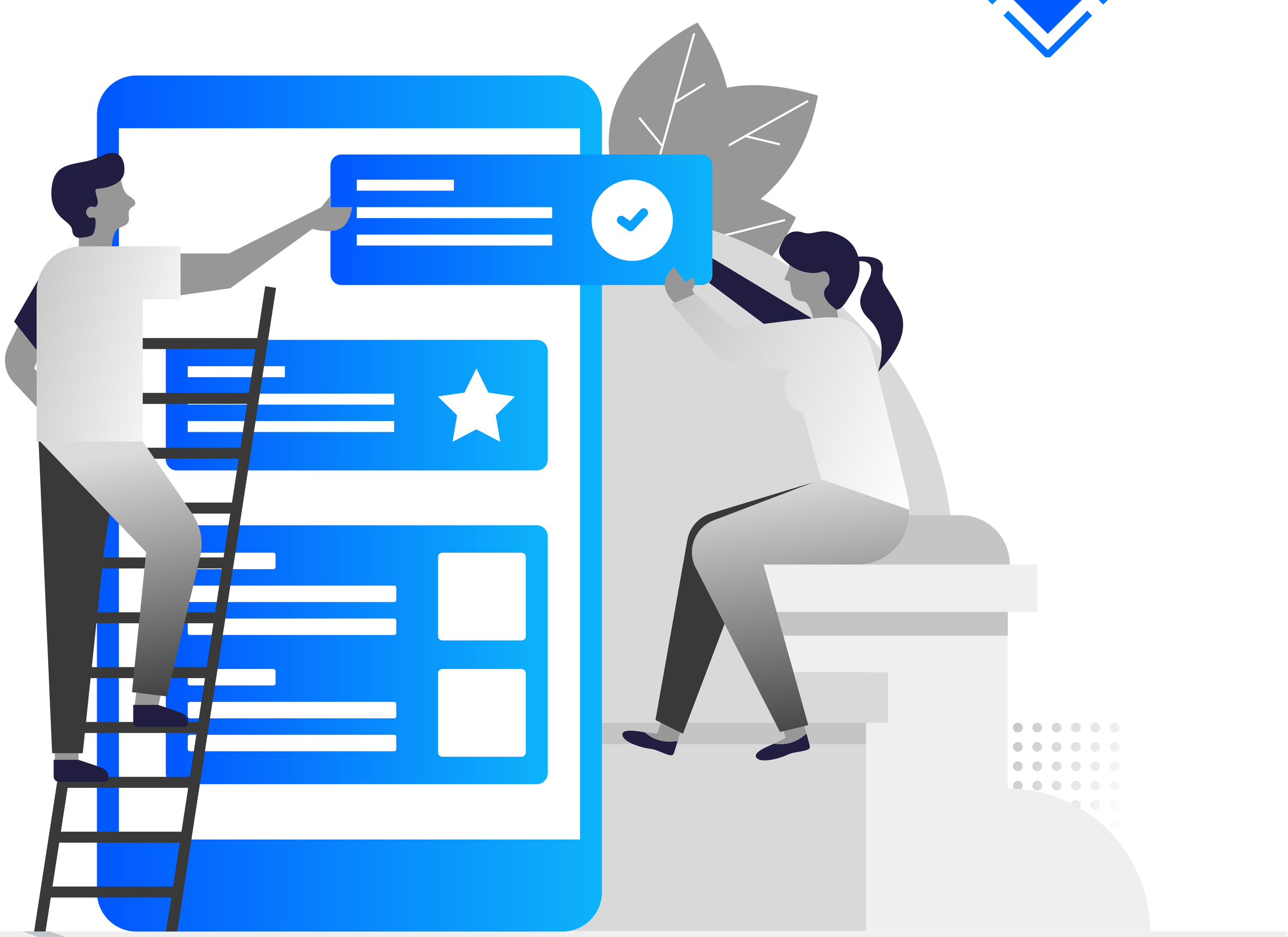
CRM Software for Small Business

What You Need to Know



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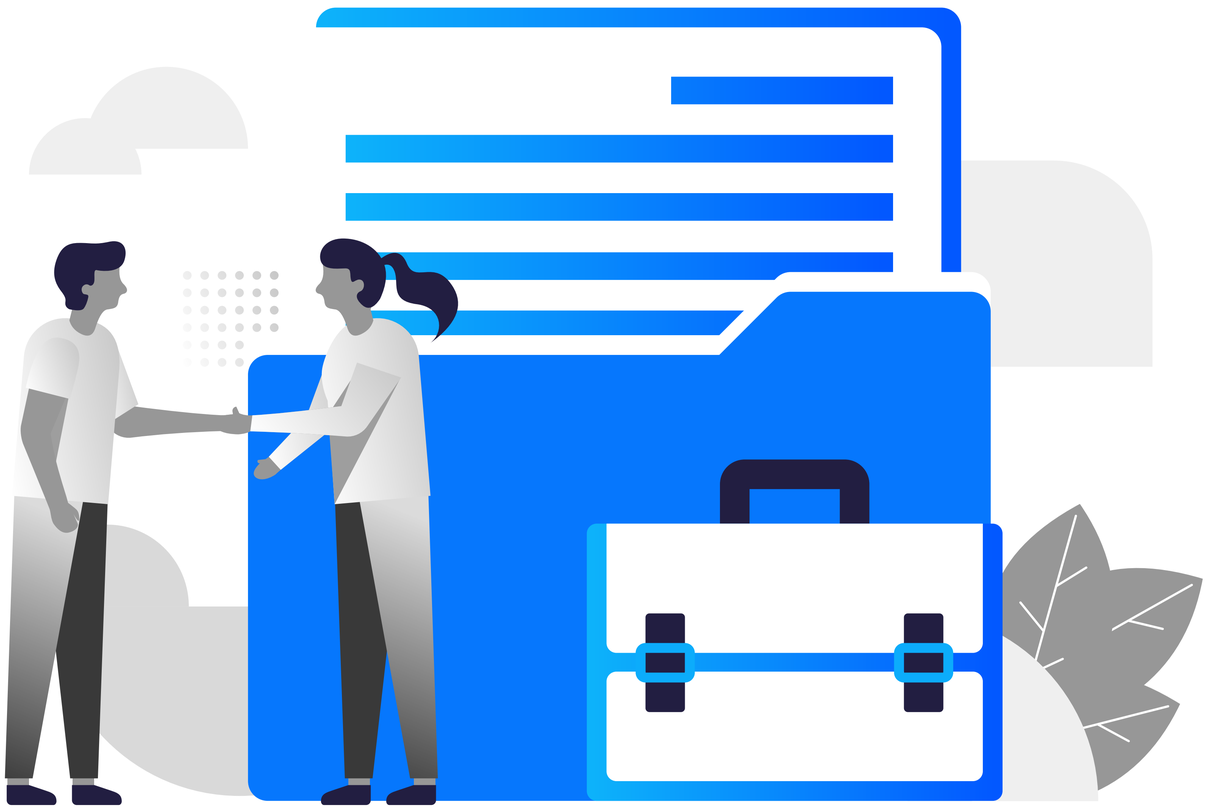
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CRM Software for Small Business:

What You Need to Know

We have good news and we have great news.



The good news is that small businesses added **1.9 million net new jobs** to the workforce last year. In other words, small businesses remain the economic engine of the country.

With growth comes increasing competition, however. In order to survive, companies have to navigate the ever-shifting landscape of marketing and sales. Those who fail to adapt to changing times simply fail. This is especially true where technology is concerned.

The great news is that you're here reading this eGuide: That means you're already searching for digital solutions in a digital age.

In this guide, we provide an overview of CRM software (customer relationship management); a prevalent, robust technology that helps you manage your customer base, maximize sales efficiency, and ultimately grow your business.

What is a CRM System?



CRM software allows you to create a central hub for all of your customer information. It is a living record of every interaction you have with a given customer and includes their contact information, sales activity, recent website visits, touchpoints with your organization, customer service complaints, and more.

When the software is filled with all your contacts and integrated with other third-party software, it is a *CRM system*.

Being able to access this information in real time allows you to tailor communication and make data-backed decisions: CRM is designed to help you create the most streamlined sales process possible.

> *You don't close a sale, you open a relationship if you want to build a long-term, successful enterprise.*
>
> **Patricia Fripp**, CSP, CPAE

5 Capabilities of a CRM System

- Trigger reminders for follow-ups
- Maintain rich customer profiles
- Identify most profitable accounts
- Segment audience and identify trends
- Automate repetitive tasks and activities (e.g., reports)

Who Is CRM For?



The Excel sheet may be enough for a budding company. However, spreadsheets aren’t a scalable solution. As a business grows, it needs a way to stay organized and manage its growing customer base.

CRM is a major asset for a company looking to manage customer data and optimize the sales process while saving precious time and energy. It can be an especially powerful tool for small and local businesses, which often have limited resources.

Data accessibility for salespeople shortens their sales cycles by 8-14%.

Nucleus Research

5 Signs You Need a CRM System

- You have no central hub
- Customer data is difficult to track down
- You struggle to compete with big brands
- You aren’t sure how salespeople are performing
- You don’t know which marketing campaigns are effective

What Can a CRM System Do for Me?



Everything you could want to know about your customers is recorded in your CRM. Whether you work in sales, marketing, support, or wear all of the hats, CRM enables you to deepen customer relationships with a "cheat sheet" for each account.

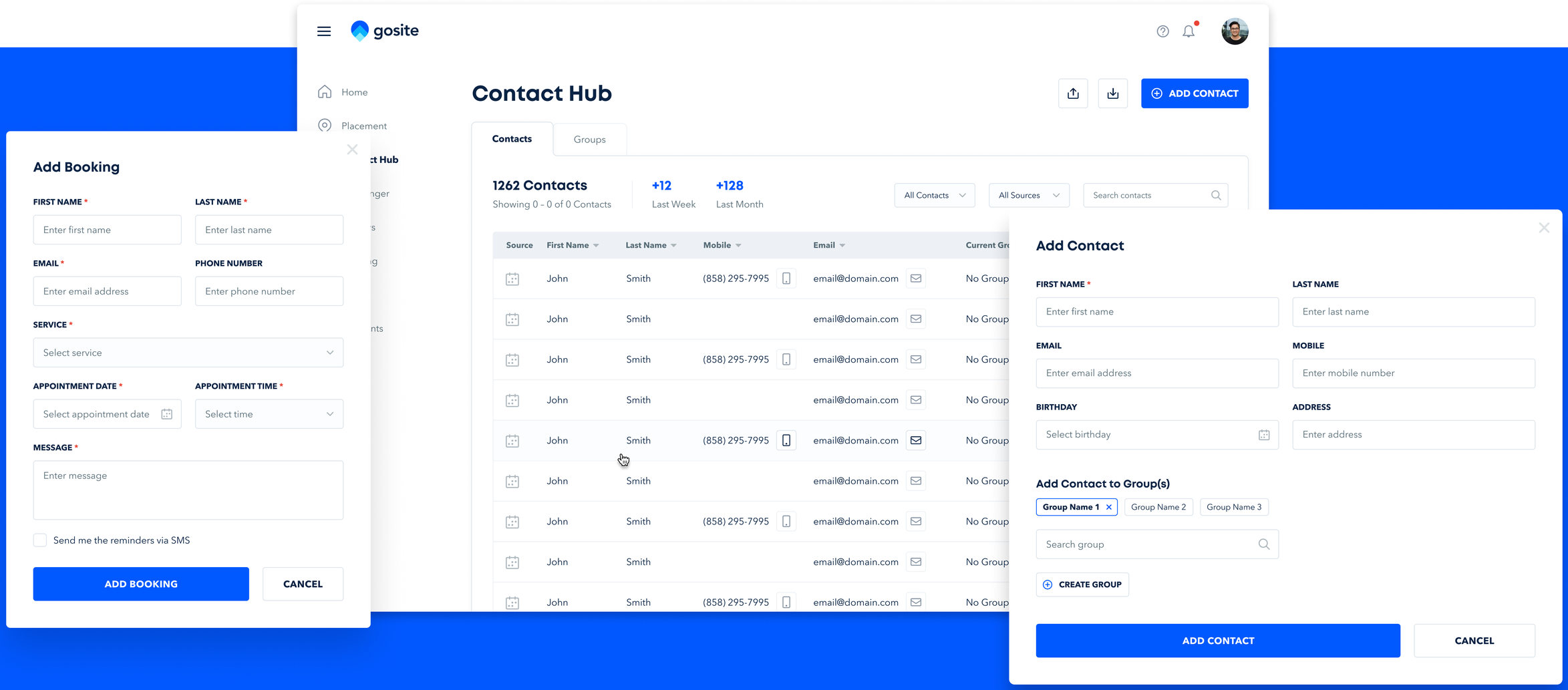
These rich customer profiles can tell you which marketing campaigns are generating the greatest number of leads. They also reveal exactly where a prospect is in the pipeline, making it easier to get the right resources to the right prospects at the right time. The result: an optimized sales process.

> *CRM pays back $8.71 for every dollar spent.*
>
> **Nucleus Research**

5 Benefits of a CRM System

- Increase revenue and profitability
- Create marketing strategies
- Identify trends in customer complaints and feedback
- Track opportunities to resell, cross-sell, and upsell
- Improve customer relationships with personalized interactions

How Do I Choose a CRM?



At their core, CRM systems serve the same function: grow business by capturing customer information in a single hub. Small and local businesses tend to have unique needs, however. It's important to choose a CRM provider that takes those needs into consideration.

Make a list of the functionalities you know you'll need. If you're not sure what you need, check out our **CRM tool** for an example of helpful features. Be sure to discuss possibilities with the team members who will use the software, as this will help you identify any inefficient processes or workflows that CRM can assist with.

> *How you gather, manage, and use information will determine whether you win or lose.*
>
> **Bill Gates**, Founder, Microsoft

5 Qualities to Look For in a CRM System

- Scaleable
- Syncable
- User-friendly
- Cloud-based
- Customer support included (e.g. text, chat, and phone)

See How One Business is Winning with CRM



Small businesses can win online.

See how one local business was able to organize 12 years' worth of spreadsheets in just a few clicks—and how they're marketing more effectively because of it.

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A complete software suite that makes it easy for customers to find, engage, book and pay for your services online.

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