



real help on

Managing customers

Growing your business means
evolving your customer relationships

sage

The smart way to grow your business

Your customers are your business - without them, you just couldn't exist. That's why adding value by using Customer Relationship Management (CRM) techniques is one of the smartest things you can do for your business.

Ask any successful company, big or small, and you'll find that they never, ever take their customers for granted. They'll also tell you that it's much cheaper to hold on to the customers you already have than to always be on the lookout for new ones. Plus, if you work hard at building close relationships with your customers, the chances are they'll be more loyal - and more likely to generate word of mouth recommendations. Sound advice - especially for smaller businesses. But what's the real secret behind getting to know your customers, and using that knowledge to grow your business?

Tips for success

It's all about managing your relationships

Management Consultants have been shouting about it for years. In techspeak, it's called CRM. In everyone else's language, it's called Customer Relationship Management. Put simply, it involves using constantly refined and updated information about current and potential customers to anticipate and respond to their needs. Even simpler than that, it's about offering added value, together with the kind of personal service that makes your business stand out from the crowd - and that your customers won't forget in a hurry.

Attention to detail pays

For example, if you know a key customer prefers deliveries on a Thursday, then you need to make sure that's what happens. Or, you might offer preferential terms to certain customers - you need to remember these terms every time you do business. Or a particular customer might prefer to be contacted by e-mail, while another prefers the phone. And so on, and so on. There are plenty of ways to manage this information - a stack of post-it notes on your desk, a shelf full of files, or you might just have a great memory. But what happens when your company grows? Or what if you needed to share this information with a colleague? Handing over a pile of creased post-its certainly won't do much for productivity!

Identify your best customers - and keep them

Your best option is to use dedicated CRM software. It can put all your essential prospect and customer information in one easily accessible place. It can help you keep detailed records of customer preferences and sales history. And it can help you target your sales and marketing messages much more effectively. The bottom line is that CRM software can make all the difference between identifying your best customers - and keeping them.

After all, your customers are your business.

What kind of businesses use CRM?

CRM techniques are used by businesses of all sizes, in virtually every industry. But they all have at least one of these in common.

1. A wide variety of customers

If your customers are spread across the country, or vary in age, average purchase value or anything else, the chances are they'll each have their own preferences that you need to remember.

2. Customers who buy often, or regularly

If your customers regularly buy your products or services or they buy them often, knowing who's buying what - and when they're likely to want it - is essential in maintaining competitive advantage.

3. The need for regular sales communications

If you regularly contact your customers with sales and marketing messages, it's important to plan your campaigns effectively and efficiently, and to make sure you always contact your customers using the method they prefer.

4. More than one salesperson

With multiple salespeople, there's always a danger of duplicating sales activity. Even if your company has only one salesperson, your customers won't appreciate two calls about the same product.

5. A business based on trends

Are your sales going up, or down? Is the trend seasonal, or monthly, or weekly? The ability to keep track of sales trends and to pinpoint where you're going wrong - or right - can be a valuable asset to any business.

Choosing the right CRM software for your business

When it comes to CRM software, there are a huge range of available options. So before you buy, here's our guide to essential features that could really make a difference to your business.

1. Easy to use

With many different people using CRM software (for example: salespeople, marketing people, customer services, support staff and general management), it is essential the software is easy to use and encourages everyone to use it effectively.

2. Contact Management

Most CRM software offers contact management features. Look out for the ability to enter comprehensive information and notes about your contacts and customers - and the ability to access it whenever you want.

3. Schedules and To-do lists

Good CRM solutions help manage your activities effectively, allowing you to schedule sales calls, meetings and other tasks. They also allow you to view and print your schedule in a range of ways.

4. Tracking sales goals

Managing your sales team's strategy and success is vital. Make sure your CRM software allows you to analyse your sales pipeline, and filter it by estimated close date, sales stage, profitability of close and other key factors.

5. Reporting

Many CRM software solutions offer a range of standard reports such as phone lists and activity reports, however, the most effective solutions also allow you to customise and summarise your reports virtually any way you like.

6. Customisation

No two businesses work the same way, which is why well designed CRM solutions are fully customisable, and can be tailored to match the way you do business.

5 key ways in which CRM software can help your business

- Your business will be more **customer focused**
- You'll be able to identify your best customers - **and keep them**
- You can segment and target key customer groups - **at the right time**
- You can provide an **exceptional, personalized service**
- You'll be able to **reward loyal customers**

It doesn't matter what size your business is, how many employees you have or what you sell, Sage can help you improve your customer relationships and grow your business. Our ACT! Software is the world's best-selling, diary and contact management system which keeps you organized, in touch with customers and prospects and ahead of the game.



For further information on our range of CRM solutions, call Sage on **0800 44 77 77** or visit us at **www.sage.co.uk**