

Increasing your Business Productivity



Where do you start?

One of the easiest ways to enhance your productivity is via Customer Relationship Management (CRM) software. Use this ebook to evaluate your company's current sales, marketing and customer service processes and get our suggested tips and methods to revolutionise your business productivity using CRM.

Simply answer 'Yes' or 'No' to the questions posed and provide an example of your current practices, then compare it to what you could be doing with the help of CRM to reach Maximum Productivity.

The productivity gains you can achieve via CRM are comprehensive, so to make it even easier to complete, we've split this ebook into departmental sections, focusing on marketing, sales, customer service and senior management. Please work with the necessary staff of each department to progress through this ebook and find out what percentage of productivity gains you could be achieving.

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Marketing



Marketing is where it all starts, where an unknown individual becomes a prospect that knows who you are, what you do and how good you are at it.

Unfortunately, raising awareness and targeting your key audiences effectively requires an awful lot of work from marketers, busy creating attractive content and detailed campaigns.

But there are simple ways to reduce the time spent on resource consuming tasks, such as data management and campaign processing. Working with your marketing department or other appropriate staff, please complete the table below:

Questions	Y/N	What's your current process?	How CRM could help
Do you save created content on your CRM?	Yes No		<p>All created content should be stored centrally in a multi-purpose document library. In doing so, you can alert sales at the click of a button when new content is available or when new material or offers are due for release.</p> <p>This saves you time and reduces ad-hoc requests from your colleagues regarding which marketing communications have been sent out and where copies and certain resources, such as brochures, can be found.</p>



Questions	Y/N	What's your current process?	How CRM could help
Do you process campaign results manually?	Yes No		<p>If you are processing and logging click-throughs manually, then it is a bitter sweet task. On one hand, you hope a campaign does well, but on the other, dread spending a morning processing the results.</p> <p>Success shouldn't result in more work: use CRM software to automate the follow up process, from a contact clicking through on a campaign, to being nurtured into leads and assigned to an appropriate sales team for follow up.</p>
Is segmenting data laborious?	Yes No		<p>There's no secret that you achieve better results by tailoring your content to selective targeted audiences. Yet, segmenting your data can prove to be a tiresome process, especially if your data is complex.</p> <p>Using your CRM, you can compile more intricate searches, based on both the data you want to retrieve and the data you want to suppress. Then, save your searches in an indexed library, so they don't have to be recreated on a regular basis.</p>



Questions	Y/N	What's your current process?	How CRM could help
Do you manually track your social media in detail via your CRM?	Yes No		<p>Social media is a vast resource, but unfortunately isn't a very well organised one. As such, attempts to track and monitor your social media activity can be very time consuming.</p> <p>Though social media traffic is king in terms of web audience size, only a fraction of these people are viable prospects looking to purchase.</p> <p>To reduce time wasted on reviewing every retweet, focus on the traffic driven to your website via social media. Those who are genuinely interested will happily fill out forms for content they require and by using CRM web-to-lead forms, such enquiries can be automatically fed into the sales team's pipeline for a timely follow-up.</p>
Does duplicate detection take more than 30 minutes a month?	Yes No		<p>There will always be some work involved with duplicate detection, some of which only a pair of eyes can pick up.</p> <p>However, if you conduct a detailed de-duplication within your CRM once a month, simply merging records rather than deleting them, then you should spend no more than 30 minutes on this task. If you are following these steps and it's still taking you longer, then take a closer look at your data entry points.</p>



Questions	Y/N	What's your current process?	How CRM could help
Can you send campaigns at exactly the right times?	Yes No		<p>Automating on-going campaigns to start when a record field reaches a certain value, not only saves time, but ensures you can communicate with your target audience at exactly the right time.</p> <p>For example, a customer who has just cancelled their subscription or a prospect who has just purchased for the first time can be set on a course to receive highly specific emails and communications at timely intervals, automatically via your CRM.</p> <p>Apart from initially setting up the campaign, such activity will run smoothly and without additional effort required by you or your marketing colleagues.</p>

Want to learn more about making your marketing more effective with a better return on investment?

Download our datasheet or watch our free WebCast '**How to reduce your marketing spend but still generate leads**'.

Sales



Sales is an area where CRM can deliver some of the most noticeable productivity gains, because increasing the productivity of your sales team will drive revenues forward. Fill in the table below, according to how your company currently operates:

Questions	Y/N	What's your current process?	How CRM could help
Is your sales team able to work from anywhere at any time?	Yes No		<p>Your sales staff should be able to work from anywhere, at any time. This is a huge productivity booster, as your sales teams can effectively utilise their own laptops, mobiles and tablet devices to create more working time.</p> <p>This also allows them to remain in complete cohesion with the rest of the company when they are out in client or prospect meetings.</p> <p>They can update records, edit them and keep one step ahead of those dreaded last minute changes, ensuring they can respond to opportunities or issues immediately, improving conversion rates and revenues.</p>



Questions	Y/N	What's your current process?	How CRM could help
Is the proactive contacting of customers costing you a significant amount of time?	Yes No		<p>If you segment your customers with your CRM by value, number of purchases and when they tend to purchase, you can ensure you are contacting a list which is going to be receptive to a sales offer at the right time.</p> <p>This will reduce the usually high number of unresponsive sales calls which end without a lead being gained and increase your sales staff's ability to focus on contacting high value, high volume customers at the right time.</p>
Is your sales team highly organised?	Yes No		<p>In a busy sales department, with leads flying around, calls coming in and opportunities progressing, it's easy to let leads slip through the net.</p> <p>Use your CRM to provide strategy templates and automated milestone notifications to give your sales team a lead follow up process, which involves very little work from them and is completely dependable.</p>



Questions	Y/N	What's your current process?	How CRM could help
Is your administration process efficient?	Yes No		<p>Passing PO's through the sales process and onto the next stage can involve some poor member of staff in sales admin being constantly on the phone with suppliers and partners.</p> <p>Give your suppliers or partners access to the key information they need to keep everyone on the same page via a web portal to your CRM. Security protect their account so they can only see and edit the information you want them to, and it will dramatically cut the time spent chasing them and fencing their questions.</p>
Can your sales staff customise how they see data?	Yes No		<p>Each sales person will have their own sales pitch for the varying situations they encounter, drawing on a certain set of key information.</p> <p>If your sales staff can individually choose which information they want instant access to in their CRM, then it will save them from having to adhere to one inflexible uniformed view, causing them to waste time finding the information they want to view for their approach.</p> <p>It's a small function, but can benefit sales greatly by reducing research time and increasing opportunity success while encouraging individual best practice.</p>



Questions	Y/N	What's your current process?	How CRM could help
Do your sales quotas automatically update?	Yes No		<p>A key sales target for sales people can be a distraction, especially if it isn't calculated automatically.</p> <p>Sometimes, deals and percentages can become complicated, especially if they are being worked out via a calculator or inflexible, limited software. Your CRM software should be able to calculate flexible quotas in an instant, so each member of the sales team knows exactly where they are against their target.</p>

Want to know how to get more from opportunities and your sales team?

Download our datasheet or watch our free WebCast '**Managing Sales in Maximizer – a LIVE Demonstration**'.

Customer Service



Attempting to enhance productivity in such a fast paced environment as customer service can seem daunting. However, in many cases productivity is hindered by staff simply not having the right tools at their disposal or not using those tools in the right way. Increase productivity by enabling your service team to delight customers with improved resolution times and excellent customer service by using CRM software.

Fill in the below table, answering how your company currently operates:

Questions	Y/N	What's your current process?	How CRM could help
Can your service representatives find ALL the customer information they need instantly?	Yes No		<p>Your service staff are often under pressure to know a customer's entire history in an instant, which is expected by every customer and is vital to ensure customer loyalty.</p> <p>Make sure your CRM is set up with a familiar and highly user friendly history feed which can be filtered automatically, as part of user preferences.</p> <p>This makes finding last correspondence and service documentation issued a lightning fast experience for both the customer and your staff.</p>



Questions	Y/N	What's your current process?	How CRM could help
Are you able to access a knowledge base of service information?	Yes No		<p>You cannot expect your service staff to be experts in every aspect of your business and the products you sell. Therefore, it is vitally important your customer service team can find the information needed to resolve those rarer and more sensitive customer issues which, if not dealt with in a timely fashion, can lead to a process slow down and possible escalation.</p> <p>Keep a central repository of searchable and categorised information of all issues historically received within your CRM software to reinforce your service staff's knowledge. This will facilitate rapid response and allow the case to be linked with relevant instructional articles.</p>
Is your CRM integrated for telephony (CTI)?	Yes No		<p>It's amazing how much time you can save by integrating your CRM with your telephone system.</p> <p>This makes logging one of the most frequent and vital communication methods for customer service representatives automatically, saving time on the tiresome task of doing it manually.</p>



Questions	Y/N	What's your current process?	How CRM could help
Have you provided customers with the ability to handle and monitor their own service cases?	Yes No		<p>A customer service portal added onto your CRM solution can save as much time as an online help forum and it can be economic and simple to implement.</p> <p>It gives your customers the chance to view and add information to a service case and reassures them that it is progressing, cutting the volume of case enquiry calls.</p>
Is your case resolution, escalation and re-assignment automated?	Yes No		<p>The processes around resolving simple cases or escalating and re-assigning more complex issues can all be automated via CRM software.</p> <p>This not only saves time on the manual work usually involved in carrying out these tasks, but also ensures cases are resolved as quickly as possible.</p>

Want to know more about how CRM can reinvent your ability to excel in providing your customers with an unbeatable experience?

Download our datasheet or watch our free WebCast '**How do you offer pre-eminent Customer Service?**'

Senior Management



Due to the changeable nature of their work, productivity gains for Senior Management can be hard to implement and may seem minor in comparison to wholesale changes to customer facing departments. However, freeing up the time of your senior management will not only make them more efficient, but will empower them to increase the performance of their departments.

Work with you senior management to complete the below table, answering how your company currently operates:

Questions	Y/N	What's your current process?	How CRM could help
Do your managers know exactly what is happening within your company, at any time?	Yes No		<p>Reporting can be a delayed and time consuming task, hindering the insight gained by managers and eating into their time.</p> <p>CRM software should allow your senior management to easily create their own reporting metrics, which not only provide key business intelligence, but also gives them the ability to retrieve the data required in real-time.</p> <p>Empowering your managers to create their own real-time reporting metrics based on what they want to see, which can be drilled down into with a few clicks, allows them to make faster and more informed business decisions.</p>



Questions	Y/N	What's your current process?	How CRM could help
Are you automatically kept informed of key milestones and events?	Yes No		<p>Keeping a constant eye over metrics and key accounts can be extremely time consuming.</p> <p>Your CRM software should allow you to create simple automatic alerts when metrics reach certain amounts or when fields and activities reach milestone events.</p> <p>This not only saves your managers' time, but alerts them to important changes, should their attention be focused on another task.</p>
Can your senior staff effectively manage from wherever they are?	Yes No		<p>Using your CRM whilst on the move is perhaps the most vital productivity gain for your managers, as they can monitor their metrics, control their calendars and set up tasks and activities for their staff back in the office, regardless of where they are.</p> <p>This means the huge amount of time they spend between office meetings, commuting or travelling on business trips can be utilised.</p>



Questions	Y/N	What's your current process?	How CRM could help
Does common office software integrate fully with your CRM system?	Yes No		<p>Senior staff regularly have need for a diverse range of software and often live from their Microsoft Outlook accounts.</p> <p>Make sure that your CRM is able to fully integrate with common office software, to save managers' time in tracking their correspondence and utilising data across multiple applications.</p>

Want to learn more ways in which your senior management can achieve more with CRM?

Download our datasheet or watch our free WebCast '**How I use Maximizer to grow my business – MD insight**'.

How much could you be gaining:

Next Steps:

Now you've highlighted the areas in which your company could improve its productivity, take the next steps to a more productive and profitable future by:

- Requesting a **14 Day Trial** of the latest Maximizer CRM software, and see for yourself how you can implement the tips and advice covered in this ebook
- Taking a **Test Drive** of Maximizer's CRM software, for a quick no hassle look at how CRM can benefit you and your business
- Requesting a **1-2-1 demonstration from a technical consultant** of how Maximizer CRM could fit into your business' current processes seamlessly.

If you would like to know more about Maximizer CRM or any of the topics covered in this ebook, please contact our friendly team on **+44 (0)845 555 99 55**, email **info@max.co.uk** or visit our website **www.max.co.uk**.