How a CRM helps you gain more 'customer time'

An analysis based on leading CRMs – Salesforce.com, Oracle Siebel, Microsoft Dynamics, Sugar CRM & NetSuite

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Around two decades ago, with the Internet still an unknown commodity, the only possible way for a team to work was for them to operate from the same physical location. A decade ago, with Internet and email having made its mark, it was possible for teams to operate from remote locations, but such convenience came with severe drain on productivity and efficiency.

Today, thanks to high speed broadband, the arrival of powerful mobile computing devices, breakthrough technologies such as cloud computing, advanced software that facilitates real time chat, teleconferencing and seamless file sharing, it is possible for an individual to work from anywhere in the world where Internet connectivity is fast and reliable.

Such geographically dispersed teams offer huge benefits in terms of efficiency and cost savings. With sales teams, the advantage is even more profound, offering the ability to reach out to customers at different places on a personal level.

This however, does not mean that a sales team spread across different locations would perform efficiently and seamlessly just like that. Geographical separation is still a serious handicap, and managing the sales team spread across different places, in real time depends on how the team's leaders or managers leverage technology to overcome such handicaps and impediments.

Here's how CRMs play such a vital role in this regard:

1 Results Oriented Approach

Managing remote workers always requires a results oriented approach. The team leader or manager needs to make explicit the objectives upfront, coordinate with the remote workers to execute the objectives, and meet the targets. Then, the workers must be assessed on the basis of the laid down, key performance indicators.
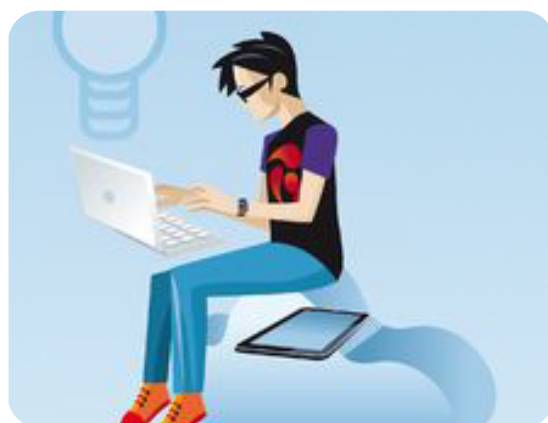
The success of such an approach depends on effective communication and collaboration. In today's fast paced world, decisions and actions have to be taken fast,

mostly in real time. As such, the time gap between making explicit the objectives, and executing them is zilch.

A good customer relationship management (CRM) suite makes this task easy. Online CRM suites tie together cloud based repositories, mobility based access and customer platforms, allowing for more effective and seamless collaboration among team members. Good CRM suites also integrate social media, email, and more, in real time, making the job of the sales team considerably easier. Sales teams no longer have to spend time on the "procedure." When meeting the customer, they are armed with not just the latest and most relevant information, but they are also connected to their team members in real time, to make instant decisions and commitments. No time is wasted on follow-up, seeking authorizations, and other drags – usually long enough for competitors to strike.

Most CRM suites facilitate online collaboration that makes project execution easy and seamless. The Salesforce CRM for instance, allows teams to set up tasks, activities, and events, to make job management easy. Team members will be reminded of the upcoming deadlines, and can make updates for others to see and respond, all without any administrative or developer effort.

Sugar CRM offers a complete web calendar that not just allows the team to keep track of customer meetings, set reminders, and more, but also delivers a history of customer meetings, contact, sales opportunity or support cases. The Sugar calendar integrates with other calendars as well, and it is easy to drag appointments to the Sugar calendar from popular email applications.

Oracle Sibel MRM provides robust project management capabilities that supports the creation, organization, and sharing of project-related schedules, tasks, and resources. It has an efficient system of capturing and communicating projects, tasks and deadlines, to everyone who needs to see them.

2 Effective Communication Set Up

The ability to remain connected with the remote worker in real time is the vital cog that determines the success of sales teams spread across locations. Such teams would, in almost all cases need to go beyond normal internet connectivity and generic chat

software. In fact, they would even need to go beyond dedicated chat rooms with web cameras.

A comprehensive CRM suite again makes the task easier. Good CRM suites that interconnect the different elements of the marketing campaign, offer a nodal point from where the remote executive may access any information they require at the drop of a hat - without making specific requests. A cloud based system, with clear cut access rights for each individual employee is the best solution to ensure that employees can access the required information easily and seamlessly, without unnecessary holds ups for retrievals. Sales executives can access analytical reports and client history through the dashboard interface of the suite, to improve sales execution considerably.

A good CRM suite also integrates the latest cutting edge technology. For instance, CTI enabled apps can help organizations use their telephony network to do video and audio conferences seamlessly.

It is equally important to upgrade the technologies in use - instant messaging, VoIP, teleconferencing, chat software, and document storage on a regular basis. Here, cloud based solutions score again, as both regular patch updates and upgrades to the latest version takes place at the provider's end, without bothering the already hassled sales team with technical drags. It is important to have the latest versioning in place, to avoid unnecessary iterations that serve as a cog in the wheels.

Oracle Siebel MRM enterprise marketing calendar offers visibility into all marketing initiatives across the company or into a subset of initiatives, depending on visibility rules. Marketers can see the status of an initiative at a glance, and drill down for more information.

Sugar CRM offers on-premise and cloud based versions of its CRM, and also makes available the source code of the suite, allowing marketers the benefit of unrestrained customization and also deeper integration with their own in-house systems. It also integrates well with Microsoft Outlook and Lotus Notes.

Nimble, a relatively new web-based application has gained a reputation for deeply integrating Facebook, Twitter and LinkedIn to the standard CRM functionalities. The tool allows users to listen in on social media activity to identify opportunities, and integrates all possible activity, communication as well as contact management tools with it.

Salesforce Chatter is, the "Facebook for an organization." This enterprise social network offers the ability to create custom actions and deploy to every desktop and device instantly. Team members may access any app from a fast, easy-to-use social feed.

3 A Centralized Structure

A comprehensive CRM supported by a state of the art communication infrastructure is a good foundation to manage the sales team effectively in real time. But, to achieve excellence, more work is required.

Very often, customer facing software remains rigid and hardware based, making it difficult as well as expensive for the remote sales executive to engage with the customer quickly and effectively. Integrating communication hardware and software from different vendors by building a bridge between different components is one way of resolving the issue. Extending the scope of the CRM to institute a seamless, communication enabled business processes is the better way.

Such a business process would integrate all business and communication channels, and link to all available data and knowledge depositories. This helps in many ways. One example is centralizing outbound marketing campaigns by connecting disconnected and dispersed initiatives into a single networked operation. This eliminates unproductive tasks, speeds up decision making and execution, while improving quality. When it comes to dispersed teams, it facilitates better tracking from various sources. The team leader can seek updates from various sources in real time, and offer the latest inputs to executives on the ground. The integrated process can also route all inbound calls intelligently, so that customers reach the resource that best addresses their needs.

Today, CRM tools allow all this setting up to happen within a matter of a few minutes.

NetSuite, for instance, offers a comprehensive CRM that has a ready-made and deeply integrated solution to all common functions, ranging from purchase order management to inventory control, and from e-commerce activity to human resources.

Oracle's Siebel MRM is even more comprehensive, offering a robust architecture to integrate work flows, and even automating several key processes such as expense management, approvals, and calendaring. It offers a comprehensive package for planning, budgeting, and executing the marketing campaign, and equally powerful analytics.

Sugar CRM's enterprise edition has some intuitive apps for enterprise opportunity management, customer self-service portal, customer activity streams and more. It also facilitates sales, marketing, and support automation.

Salesforce CRM offers deep integration and seamless automation of all key functions with just a minute of setup effort. 'Campaigns' - to launch and track marketing campaigns - is a default object in Salesforce that's easy to set up and manage. Activating Salesforce Knowledge Bases offers extensive search capability, crucial to a knowledge based system. The default Reports and Dashboards offer information in dynamic forms: pie, gauge, line, bar, donut, funnel, metric and scatter charts, to mention a few. It is also possible to switch on history tracking on specific system attributes, such as "status," to obtain a clear idea of who changes the data, and how, over time.

4 Effective People Management

Managing the sales team spread across in real times goes beyond resolving the technological challenges alone.

Observing body language and other visual cues for signs or trouble, or the extent to which the worker has bought into a proposal is one of the time tested ways to manage people effectively. This becomes difficult when the worker is not in the same space. Reliable video conferencing would solve the issue, but this may not always be possible. Rather, managing a remote sales team requires looking out for other tell-tale signs, such as:

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- Reduced output.

- Short and abrupt emails.

- Reluctance to engage in telephone calls or video conference calls.

- Shortage of new ideas, or in collecting ideas for organizational betterment.

- Not making updates or reports as required

Tracking all this requires both a centralized and integrated platform, and also real time connectivity on the go.

Oracle's Siebel MRM allows the team leader to get the right content to the right salesperson, channel partner, or customer, thereby reducing waste. Its intuitive approval workflow offers a clear cut channel to get the process moving as well.

However, email offers a more flexible way to keep in touch with remote workers, and most CRM suites facilitate easy email management and tracking, more than what the email providers themselves offer.

Microsoft Dynamics CRM offers seamless integration with MS Outlook, MS Office, MS Sharepoint and other Microsoft products.

Yet, scattered emails and linking emails with contacts, and figuring out whether it is a duplicate or a new request is a hassle. "Salesforce for Outlook" offers a solution which syncs Outlook emails with Salesforce, and helps the sales team to have precise data and its relationships. Ideas, a default feature in Salesforce helps people to submit their suggestions, and also allows the management to tag them as "Considered" or "Implemented."

5 Multidevice support

Today, keeping the scattered sales team connected alone does not suffice. Instant decision making on the go, in disparate time zones, is the order of the day. Added to this is the unfortunate reality that sales teams usually suffer from high levels of churn. As a result of these, any top-notch, contemporary CRM must offer multi device support.

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This allows any team member to access data and take decisions, irrespective of whether he or she is on the plane, at a party, or just getting out of bed. Most CRM systems have mobile apps that serve to keep global sales teams ready and active 24x7. Multi device support also means that any new additions to the sales team can simply plug in all of their devices, and hit the ground running when their first meeting comes up.

Here, all the top CRMs strive to outdo each other, in allowing diverse devices from disparate teams to log onto the company sales resources. SugarCRM for instance supports Android, iPhone-iPad, Linux, and web-based access.

Microsoft Dynamics CRM Mobile product provides support for multiple browsers on multiple operating systems, for the web client. Oracle's Siebel has an open UI that provides for the complete range of browsers and devices.

Salesforce1 though, take s this device compatibility to a higher level. Not only does it offer multi device support, it provides a development environment where any app created is automatically device friendly, without any additional coding or effort required.

Modern CRMs are instrumental in helping global sales teams function in a smooth, cohesive manner. They reduce the nitty-gritty required, and free the sales personnel's time, which can then be devoted the customer. This extra, quality time helps in converting quality customers, and keeps the team in sync with them, as well as with each other.

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