



Getting Started with CRM

A guide for businesses
looking at CRM for the first time



synergy
technology

Introduction

At Synergy Technology we have been providing CRM solutions to businesses for over 25 years. Working with clients who are new to CRM is always a rewarding experience. Time and again, we've seen the transformative effect that a good CRM solution can have.

The improvements in customer service, retention and team productivity when moving to a CRM solution for the first time, or having a truly optimised system, can be transformative, and it's truly awe-inspiring to be part of that process.

For over 25 years we have done nothing but live and breathe CRM. There's nothing we like more than working with clients to define their needs to develop a solution that makes sense to their goals and budget.

While CRM should have an immediately positive impact, the best solutions are built with the future in mind. No one wants to invest in a CRM system which is under-utilised or obsolete within months. Neither do you want to have to swap and change technologies as your requirements change.

That's why our approach is all about long-term thinking. It's rewarding to partner with clients ongoing to ensure their CRM solution remains fit for purpose as their business grows.

We appreciate that it's a big step to invest in a CRM solution for the first time. Here, we guide you through the process.



The Benefits

What is a CRM solution, and why would I need one?

A CRM solution is a software application that helps businesses manage their customer relationships. It does this by storing all the information about a customer in one place, such as their contact information, purchase history, and support tickets. This information can then be used to provide better customer service, identify new sales opportunities, and develop targeted marketing campaigns.

Improve Customer Service

Your CRM system stores all interactions with customers in one place, so everyone on your team has access to the same information. This means that customers don't have to repeat themselves when they contact different people in your company, and your team members can provide better and faster service because they have all the information they need at their fingertips. A CRM system can help you build stronger relationships with your customers by providing them with a more personalised experience.



Increase Sales

Your CRM system can also help you manage your sales activity more effectively by providing you with a central place to store and track all your sales leads and opportunities. This information can be used to create sales pipelines and to forecast sales more accurately. You can also use your CRM system to track the progress of your sales team and to identify areas where they need improvement. You can also use the information in your CRM system to create targeted marketing campaigns, and track the results to identify which activities are getting the best results.

Improve Efficiency

A CRM system can help you streamline business processes by automating manual tasks, and making sure the right information goes to the right people at the right time. CRM can provide a central repository for all of your customer data, including contact information, purchase history, and support tickets. This can help you avoid duplication of effort and ensure that everyone on your team has access to the latest information. A CRM system can also track key performance indicators (KPIs). This information can be used to identify areas where you can improve your business processes.

Remove Risk

A good CRM solution will also help remove risks from within your business. This could include removing a single point of failure caused by an over reliance on key individuals. Vital information is stored on your CRM system, accessible by multiple people and not just on one staff member's PC, or even worse, in their head! A CRM system can also be used to help your company comply with regulations such as GDPR, and reduce the likelihood of a data breach that could put the company at risk.



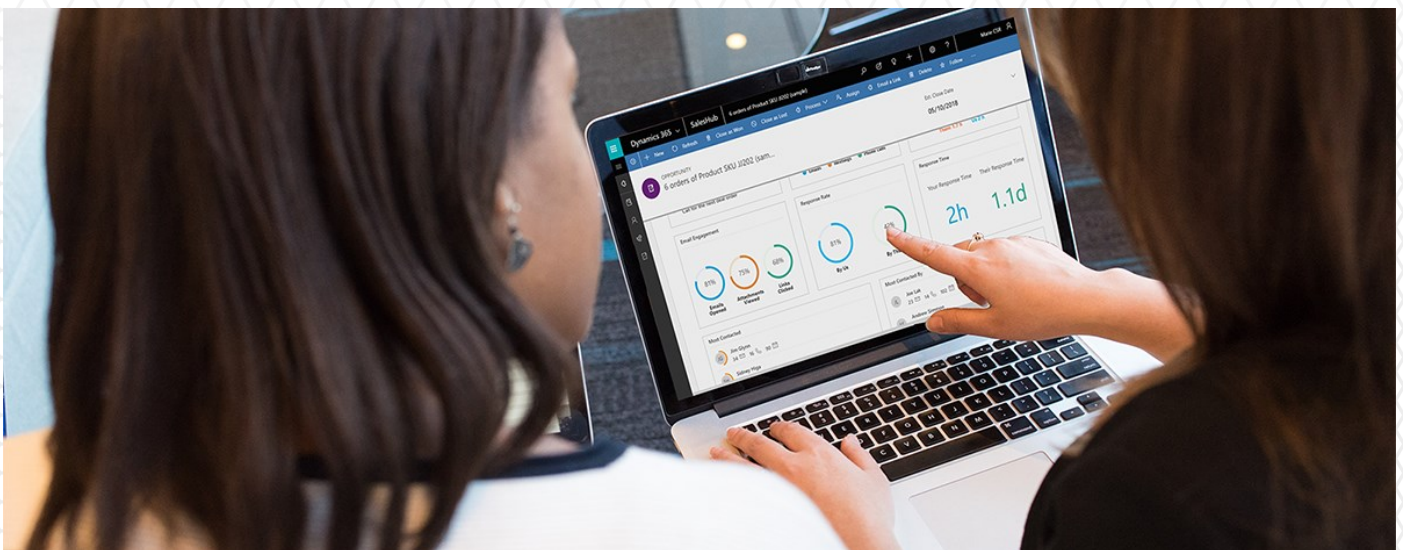
Defining Your Needs

What do you need from your CRM system?

So all of this sounds great, there are systems out there that are all singing, all dancing and can handle every aspect of a business. But is that really what you need? After all, features cost money, so you don't want to be paying for things you aren't going to use. That's why it's important to define your CRM needs, a process which we can help you with.

Taking the time to be clear about what you need your CRM system to do is an important step in the process of implementing a system, perhaps as important as the implementation itself. This step will define what system you use, how you use it, who you involve in your project and what results you measure.

We take clients through a three-step process to define their CRM needs. This process is designed to help us understand your business, your goals, and your current processes so that we can recommend the best CRM solution for you.



Step 1

Define your objectives

When defining your objectives for a CRM solution, it is important to be as specific as possible. Common goals such as more sales, efficiency, and higher levels of retention are not specific enough to enable you to properly specify your CRM requirements or to measure the outcomes once the CRM is in place and being utilised.

Because of this it will be important to get into the specifics to create a crystal clear picture of where you are now and where you need to be from a data management and business process point of view.

- Are your sales people spending too much time on admin?
- Are your business support teams doing manual tasks which could be automated?
- Are your managers able to gather the information they need about the effectiveness of their teams?
- Can your marketing team get information to the right people at the right time?
- Have you got a clear picture of your pipeline?
- Are you serving your customers well and meeting their expectations?
- Are you managing data in a compliant way?



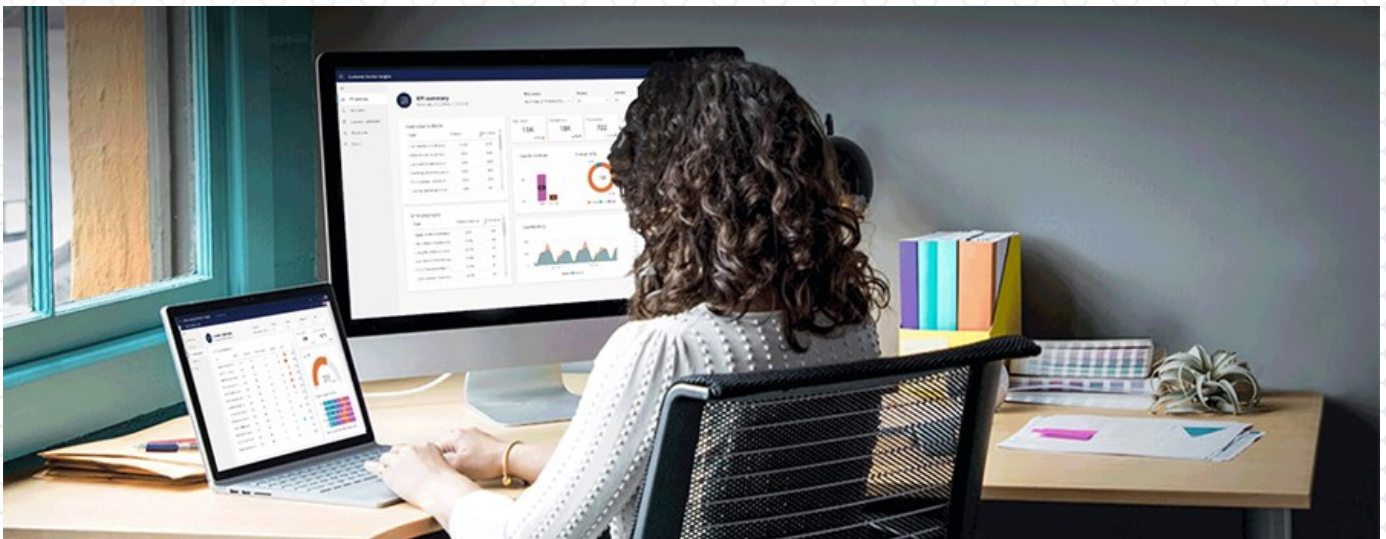
Step 2

Define which business functions will be included

CRM solutions can support all areas of your business from sales and marketing through to HR and customer service. It will be important to define which business functions are the highest priority. Of course, it is possible to include all or several business functions from the outset, but it's likely your project will be bigger, more expensive and take longer to bring to fruition.

Because of this, most businesses will undertake a phased approach, implementing the CRM solution in one or two business areas at a time. This doesn't mean the CRM solution is designed with only those function in mind. Quite the contrary, in fact. It's just that implementation is undertaken in a measured way.

- Where are the biggest gaps/opportunities for CRM to make a difference.
- For example, do you need to improve retention by getting better at customer service before you enable your sales people to win more new business?



Step 3

Define what software functionality needs to be included

Your CRM solution will need to both house your organisation's information as well as distribute information at the right time, in the right format, to the right audience. This is where a good, thorough functionality specification is vital. The functionality spec enables us to get into the nitty-gritty, and things become very exciting indeed. By joining up the thinking between 'what's possible' and 'what would make business sense', your CRM solution can be truly transformative.

Typical marketing functionality includes:

- Lead management and tracking where leads come from
- Email list management
- Campaign management
- Integration with marketing automation software

Typical sales CRM functionality includes:

- Contact management
- Sales performance management & forecasting
- Lead management

Typical customer service CRM functionality includes:

- Case management
- Online support environments
- Customer support automation
- SLA management

Reporting and analytics requirements typically include:

- Pipeline progress
- Discount effectiveness
- Leads by source/offer
- Value and behaviour of contacts by lifecycle stage

Costing your project

All too often, CRM projects are started with great enthusiasm, only to fizzle out because the costs of set-up and maintenance are not properly scoped or understood at the outset. That is where a good business case comes in. Time spent at the outset to define your requirements and understand where the biggest pay-offs will be instrumental in costing your CRM project effectively.

Factors that will affect the costs of your CRM solution include:

- The extent of the functionality you include – clearly, the more you want your CRM solution to do, the more involved your project will be.
- Whether your solution will be hosted in the cloud or on-premise. If it's on-premise, you will have server and server maintenance costs while you'll have smaller upfront but ongoing subscription costs when it's in the cloud.
- What indirect costs will be associated with your project such as consultancy, staff training, the time of staff involved in the initial project etc.
- Which vendor solution you choose and the extent to which your system is configured to your exact requirements.



Cost Stages

STAGE 1: Launch

Good CRM solutions require investment to get them off the ground, but that should not be prohibitive. The cost should be in line with your company's current and short-term financial position, which is where an analysis of your goals and priorities is so important. Additional functionality can be added to your CRM solution as your organisation evolves and brought on stream at the right time when the financials add up.

STAGE 2: Maintenance

Whilst the cost settles once your CRM solution has been implemented, it will still have a budgetary impact as steps will be necessary to maintain the system. Upgrading on premise technology, training new users etc, all have a cost which needs to be factored in from the outset.

STAGE 3: Evolution

As your organisation changes, so too will your CRM needs. Adding and amending functionality, streamlining systems and processes, embracing new opportunities presented by new technologies, all of this requires time and budget. Whilst investment in your CRM solution should be made in line with your organisation's growth, it's important to have an evolutionary mindset.

It's not easy but your business case should ideally provide an analysis of revenue and cost impacts of implementing (or not implementing) a CRM solution.



Revenue and Cost Impacts

When analysing revenue impact, it may not be possible to be entirely accurate, but you should be able to make a very good assessment of the financial impact of adopting a CRM. Look at the costs of operating the particular business area as well as the cost of acquiring and serving your customers. Also, identify the value of what more you will be able to do as a result of the CRM implementation. For example, will it allow you to serve more customers without having to increase your headcount? Will you be able to divert staff from manual activities and use them in other areas as a result of automation and improved management reporting?

Summary

There's certainly a lot to think about when you're at the start of your CRM journey. The key steps can be summarised as:

- **Define your needs:** What does your business need to achieve with its CRM solution, now and in the future. What are the priorities?
- **What business functions will be involved:** Does your CRM solution need to impact across your organisation or will you prioritise particular business areas? Who needs to be on your project team?
- **What functionality will be most important:** Join up your thinking between what's possible and what will make the biggest difference to your organisation.
- **Build your business case:** It's easy for costs to run away. Build a business case so that you get the best return from your investment.

Experts by Your Side

You don't need to be an expert in CRM to get a fantastic solution up and running within your business, but you do need to hire the best support.

We've been at the forefront of CRM technology for 25 years and have worked with hundreds of businesses in a range of industries, so are well placed to help and advise you in the early stages of your CRM journey.

Our Service Includes:

- **Consultancy:** To help you define your requirements and build a business case.
- **Proof of concept:** So that your project can be affirmed and de-risked before full rollout.
- **Implementation & delivery:** Complete service to ensure your CRM solution is properly implemented.
- **Hosting support:** We can provide hosted CRM solutions as well as cloud-based CRM and we can work alongside you if you wish to implement an on-premise hosted solution.
- **Licensing:** We can administer all of your licensing requirements.
- **Integrations:** We are particularly good at integrations, joining up your CRM solution and other systems your business relies on.
- **Training:** We can train your users to ensure high user adoption of the technology and maximum business benefit.
- **Critical Thinking:** To understand your processes and data. We understand how to architect the site to optimise and drive results through CRM software.

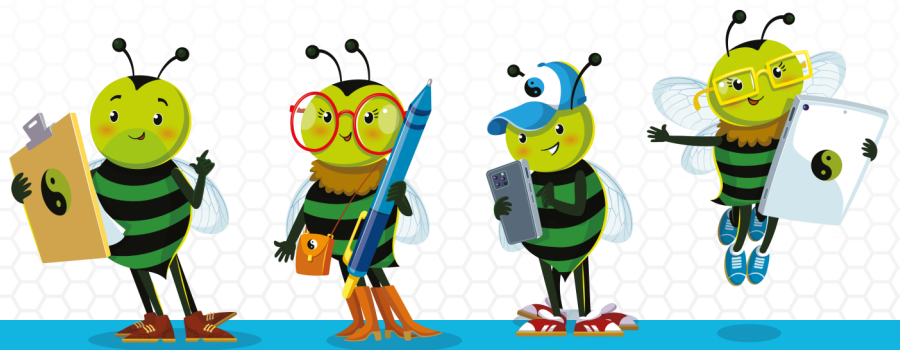


Why Choose Synergy Technology?

We seek a long-term partnership with our clients and work alongside them to help them get the best use of their solutions, to help attract, win and retain clients.

Since 1997 we have implemented hundreds of CRM and ERP solutions of differing complexity that have helped improve business performance by identifying opportunities for improvement and growth.

We have the scalability, knowledge and experience to offer the most relevant software solutions for your business needs and our highly responsive technical helpdesk works pro-actively to ensure any queries you have are resolved efficiently and effectively.



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