

Transform Your Business NOW:

Cloud Strategies *Revolution*:

6 Steps to Creating Brand Excitement & Breakthrough Results Online

“An Intervention for Destroying Fear of Social Media & Blogging
and Developing an Action Plan for Staking Your Claim in the Web 2+ Economy.”

Session #3:

Live or Die

By

“CRM”

Who Is I?

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- Sage ACT! Certified Consultant
- Salesforce.com Developer Certified in making
- Former SalesLOGIX Developer and Consultant
- 20 years experience designing and implementing CRM systems



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CRM Success Plans

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Who We Have Worked With...

- Deja.com (Google)
- DMV International Nutritionals
- Comfortex Windows Fashions
- Champlain Stone
- Pioneer Savings Bank
- SEFCU
- Danfoss Flomatic
- Efco Products
- Many more...



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Rules of Engagement

- Agenda:
 - We will cover content for 45 - 55 minutes
 - Have a 15 - 20 minute networking/phone/personal break
 - Finish out the remainder with content, and discussion / Q&A
- Please feel free to participate

Rules of Engagement

- **Cell phones OFF!** (*please*)

Not one of us are so important that we cannot be “offline” for an hour.

- We have all made the commitment to be here & benefit from this, so let’s honor that by staying focused. ‘nuff said

- This series of seminars is likely to be different from other programs you may have attended in the past, for the following reasons:

- There are no slide handouts today – *for a good reason which we will share later*. Use your mini-journal we gave you or something you brought. You will note that there are slide #s in the lower right corner of the content slides once we start.

Rules of Engagement

- Please be sure that you have checked in with Coll, verified that we have a personal email that will get to you – not an Info@ address and have initialed the opt-in because I will be communicating with you in between sessions. Why?
 - I am available to field questions regarding the things we discuss in session.
 - As mentions previously, I have created a private Facebook group where we can continue the dialog among ourselves with questions, successes, tips we uncover, etc. “Friend” me and I will add you to the group.

Rules of Engagement

- Questions:
I don't mind being interrupted, so if you have a question in the course of the content, give me a signal...

What is CRM?

- First things first: CRM stands for Customer Relationship Management
 - You may also hear:
 - Sales Force Automation
 - Contact Management
 - <..>
 - Mostly talking about the same thing

What is CRM?

- The software companies have lied to you...
 - They have told you that CRM is **“SOFTWARE”**
 - Shocker, huh?
- CRM is NOT software

What is CRM?

- CRM is:
 - A uniform way of approaching your sales and customer service.
 - It always includes:
 - People – yours and your prospects/customers
 - A goal or goals (sometimes this is unclear)
 - Training (Many, many, many companies get this wrong...)
 - And then...
 - Software (notice it is not red and shiny like the one the software company gave you)
 - And a lot of companies get this wrong too

A Correctly Implemented CRM (CI-CRM) System: Why Do I Care?

- Do any of these sound good to you?
 - No longer missing a sale because “it slipped through the cracks”
 - Saving \$\$ on marketing because you know what your customers are doing and what they buy (sorry – hunches are not good enough)
 - Knowing what your sales people are (and are not) doing
 - Easily managing projects and multiple step sales – either for 1 person or several

A Correctly Implemented CRM System: Why Do I Care?

- More Benefits of CI-CRM:
 - Handle more clients and sales with the same # of people
 - Decreasing the length of your sales cycle
 - Having more accurate forecasts of what is going to happen next month and next quarter...
 - Retain your firm's intellectual property upon personnel exiting
 - Improved employee morale
 - You rest easier, think more clearly, and let the system "sweat the small stuff"

A Correctly Implemented CRM System: Why Do I Care?

- One more benefit to ponder (there are others, but for now we'll stop here):
 - Companies that have a well crafted CRM implementation are worth more!
 - You may have no plans today to sell, but the day may come – (sooner than you think...)
- So, tell me again how it is that your company doesn't need a well crafted CRM process?
 - Having a “simple” business does not exclude you.

Deciding What Your CI-CRM Will Be When it Grows Up

- Pro-cess:
“a series of actions or steps taken to achieve an end”
- Take a look at your existing sales “process”
 - You may not have thought about it, it may be unspoken/unwritten, but you do have one
 - So the things you do to create a sale is your process.
 - If you offer a diverse set of products and services, you likely have a process for each.

Deciding What Your CI-CRM Will Be When it Grows Up

- Write your process(es) down (per product type if need be)
 - Look at them asking:
 - What could be automated?
 - Where could we gather valuable intelligence about our customers?
 - Are there extra steps you could do away with?
 - What pieces of information are valuable to me in completing the process? (“When did I send them the quote?”, “Who spoke to them last?”, “What product(s) have they purchased?”)

Deciding What Your CI-CRM Will Be When it Grows Up

- Further things to think about, page 1:
 - Do you have a customer service dept?
 - Warranties
 - Service contracts
 - Problem cases
 - Will you need to regularly import/export data?
 - Will you want to integrate with another system?
 - Accounting
 - Project management
 - Lead capture forms on your website

Deciding What Your CI-CRM Will Be When it Grows Up

- Further things to think about, page 2:
 - What “outputs” (reports) would be helpful?
 - # of sales meetings/calls/actions per period
 - Value of potential sales in the pipeline
 - How would you like to group/segregate your contacts?
 - What data would you need to search on?
 - How extensive do anticipate your customization of the system to be?

Deciding What Your CI-CRM Will Be When it Grows Up

- Further things to think about, page 3:
 - Can you benefit from automated workflows? How complex?
 - How many people – and will that change over the course of the next 24-36 months?
 - What level of security/record access do you need?
 - Do you have sales territories that you want to assign to only specific people?
 - Accounting info

Evaluating What Your CRM “Home” Will Be

- When Looking for Your CRM “platform”:
 - What can you realistically budget? (more than you think)
 - How many users do you have today and 3 years from now?
 - Are you Windows, Mac, or both? Linux?
 - Do you have a network and a server in house?
 - Do want to access your system via phones and tablets?
 - If so, Android, iPhone, other?
 - Do you need access when you have no internet access?

Evaluating What Your CRM “Home” Will Be

- CRM does not look the same for companies of different sizes – i.e. – larger companies typically will use more modules of a CRM system (from the start)
 - Call center, defect tracking, price books, customer portal...
- Different business types have differing requirements
 - Recurring, transactional sales are different from “once in a lifetime”, complex sales (off the shelf retail vs. custom kitchens)

CRM “Delivery Methods”

- 2 Primary Implementation Types:
 - On-premise
 - Cloud (Software-As-A-Service “SAAS”)
- A few systems offer both
- Cloud based systems are getting most of the buzz at the moment

Cloud CRM: What's Good, What Ain't

- Good: (Mostly) No installation needed
 - They handle software updates
 - What to ask?
 - How does it integrated with my email software?
 - Does it support the browser(s) that we use (Safari is not the same as Internet Exploder nor is it the same as the version on the iPad)
 - What about other integrations (Word, Qbooks)?
 - Do I need to install an app on my phone(s) or tablets?

Cloud CRM: What's Good, What Ain't

- Bad: How is the performance?
 - What to ask:
 - Is our current internet service fast enough to handle reasonable for ALL users?
 - Remote locations?
 - Is the app itself “speedy”?
 - Does the system require LOTS of mouse clicks to do simple things?
 - Does the responsiveness of the system change at different times of the day?

Cloud CRM: What's Good, What Ain't

- Good and Bad: Cost
 - Good – With some providers, no contract, and no large upfront cost, just monthly, per user charge
 - Salesforce.com has been known to force annual payments upfront
 - Bad: Gets more and more expensive over time
 - Good or bad: Pay for what you need, not for what you don't.
 - If you misjudge your feature requirements or storage needs, you could be in for a costly upcharge.

On-Premise CRM: What's Good, What Ain't

- Good: Control, Security, and Performance
 - You have complete control, you “own” your data
 - (Typically) Greater flexibility in customization
 - You can apply updates on your schedule
 - You have unlimited storage for documents
 - No reliance on a speedy internet connection
 - With today's fast computers, software is very snappy
 - “Real” software tends to have more shortcuts for simplifying tasks

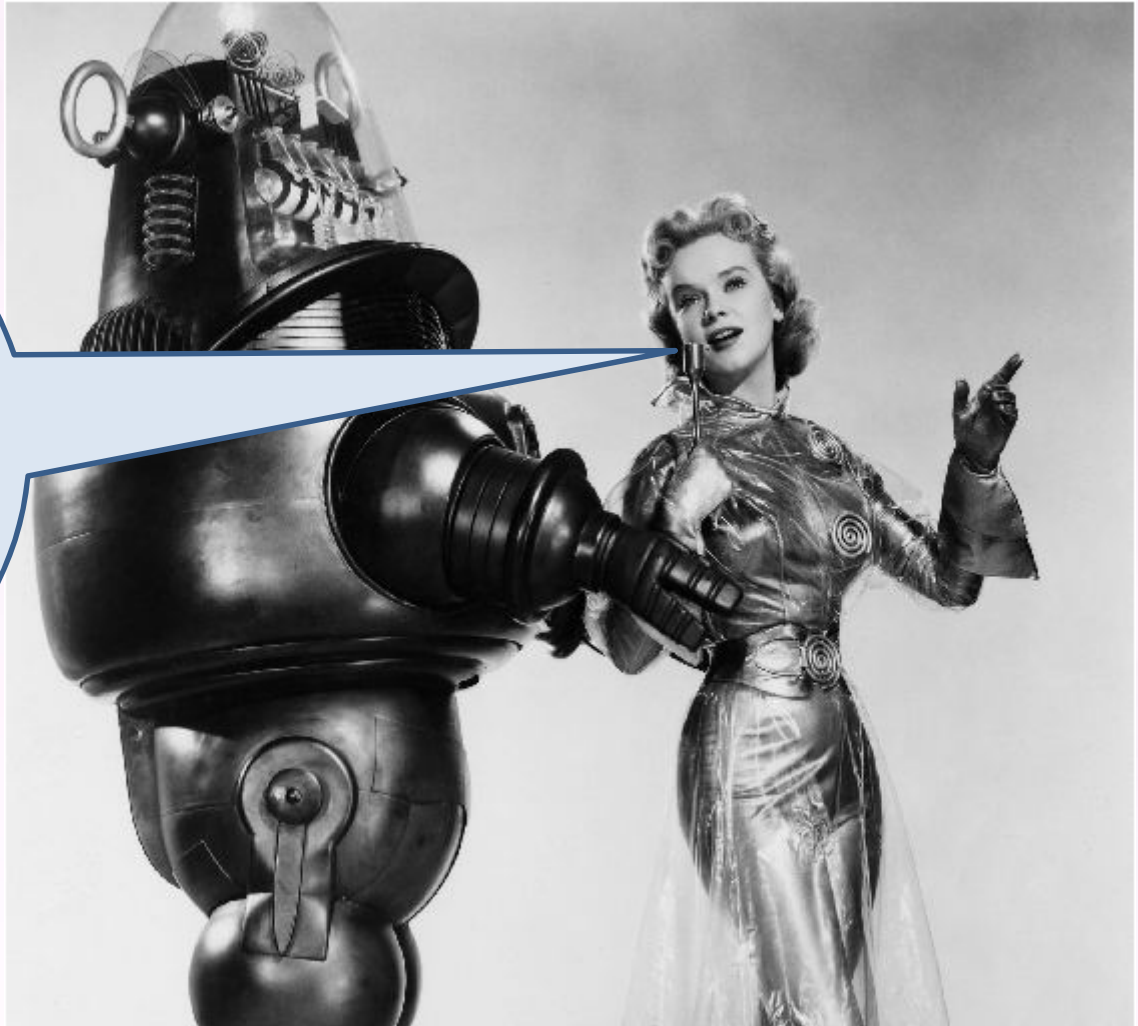
On-Premise CRM: What's Good, What Ain't

- Bad (less good):
 - More setup – need to install on each machine
 - If something goes wrong, it might be on you or require that you bring in outside help (this can also be a “hidden” snag in hosted too)
 - You handle installation of updates – some of which may require a new purchase.
 - You typically need a “server” of some kind (many companies already have hardware that is suitable).

On-Premise CRM: What's Good, What Ain't

- Good and Bad:
 - Cost:
 - Good – you buy it and use it for as long as you like, no additional outlay, the longer you use it, the less expensive it is (be careful on this one)
 - Bad – upfront cost, can be substantially more than “renting”, especially if you do not have a server
 - Good – Data ownership:
 - You have complete access to ALL of your data, and control of how/when it is backed up

**CRM so
easy –
anyone
can use it!**



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Food For Thought...

- **What would it mean to your bottom line if...**
 - **You increased the size of your average sale by 15%? And then...**
 - **You increased the number of sales per month by 12%? And then...**
 - **You were managing 20% more qualified leads per month? And then...**
 - **You shortened you average sales cycle by 35%?**
- **It's not unrealistic.**

7 Signs You Have a “Dead Shark” ...

- **#7: No Training.**

- There either has never been any formal training or it was so long ago, no one is really sure when it was.
 - No, your network guy or someone who read a manual do not count.

- **#6: No Difference.**

You have a “system”/process in place, perhaps implemented in the last 12-24, but no one can see a difference.

- CRM when done right is never a “maybe this will help” scenario. If it ain’t working, it ain’t working.

7 Signs You Have a “Dead Shark” ...

- **#5: Poor (non-existent) Selection Process.**
 - Your CRM software was proposed in one of the following fashions:
 - On the golf course or at a dinner from a business associate
 - Your tech guy suggested one that he’s seen at another customer or because his uncle Vinnie has a company that sells “that kind of stuff”
 - “We had to do something”
 - One of the better sales reps used to use this system back when he was at Proctor & Gamble

7 Signs You Have a “Dead Shark” ...

- **#4: Dissatisfied Users**

- If your users are not using the system, claiming they can “get more done” without it, this is bad.
- If users are using the system but are saying “I don’t know why, it seems like double entry”, it’s bad.
- Generally more grumbling than positive.

- **#3: No Executive Buy In**

- If neither you, the owner, nor any of the upper management use the system, the delivered value of the system is severely constricted – you have a stinker on your hands.

7 Signs You Have a “Dead Shark” ...

- **#2: Ancient Software**

- If your system is 5 years or older, you are missing out on significant changes in how business operates in 2012...

- Has there been that much change in the last 5 years?

- The Cloud
- Facebook
- Twitter
- iPad
- <..>

7 Signs You Have a “Dead Shark” ...

- **#1: Bad Data**
 - Duplicates
 - Stale records
 - Incomplete data
 - Drop-down lists with multiple “types” – I.E. Status field with
Manager/Customer/Manufacturing/Inactive as choices
 - You get the idea.

What You Should Do If You Have a “Dead Shark”.

- Admit it.
- Then admit you need help.



- You go to the doctor when you are sick don't you?
- The sooner you take action, the less damage, expense, lost sales and wasted opportunities and marketing.

Potential CRM Systems for Small Business

- **Sage ACT! 2013**, Windows based platform
 - Two versions: Pro and Premium (hosted also)
 - Pro – up to 10 users, Windows only install
 - Premium – unlimited users; Windows, Web, and HTML 5 client access; advanced security, etc
 - Leader in the market, 2.5 million users
 - Primary Modules:
 - Company (Accounts); Contacts; Groups; Sales Opportunities; Reports; Dashboards; Calendering & Tasks; Histories; Email Marketing Campaigns; Social Media Integration

Sage ACT! 2013 CRM

- **Strengths:**

- Very high user adoption rate, daily tasks are intuitive
- Highly customizable, with virtually unlimited custom fields
- Integrates tightly with Microsoft Word, Outlook, Excel
- Offers probably the most flexible searching and grouping mechanism of any product in the market
- Premium version provides access to the system from virtually any device
- Host internally or have hosted in the cloud
- Backed by a \$1 B + company
- Affordable: Pro - \$269.99 (\$11.25/mo.), Premium - \$549.99 (\$22.91/mo.)

Zoho CRM

- **Zoho CRM**, cloud based CRM
 - Two Versions: Professional and Enterprise
 - Professional – unlimited users, basic security and workflows
 - Enterprise – advanced workflows, security, autoresponders, <..>
 - Online for 8 years, won “Market Leader 2012” award
 - Primary Modules:
 - Accounts; Contacts; Sales Opportunities; Quotes and Sales Orders; Customer Support Cases; Reports; Dashboards; Web Forms

Zoho CRM

- **Strengths:**

- Fully browser based, so no installation required (Outlook integration does, minimal)
- Has a good iPad app with support for “disconnected” use
- Wide selection of modules
- Integrates with other Zoho apps such as Creator and Advanced Reporting
- Includes web forms module for online lead capture
- Established company with more than 8 year history
- Affordable: Professional, \$12/mo; Enterprise, \$25/mo., no contract “lock in”
- Get a copy of ALL of your data for just \$10

Q & A
/
Open
Discussion



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