

CRM INTEGRATION

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1. Introduction

CRM is about realization of company goals that work well with your current back-end data. To understand the real value of a CRM solution, you must look at it in flow with your ERP, or other processing systems and data to link it in a real environment. After all, if CRM looked just like your off-the-shelf customer management system with details of contact information, what is the use of racking your brains and resources over something as cliché and ordinary?

Let's get down to some realistic thinking. What is a CRM solution? How is it different from a contact management system? CRM is a concept that covers the entire orb of relationship between the company and its customer, by providing comprehensive details about the customer, far beyond contact and location details, which essentially is the area of focus for contact management systems.

Apart from providing customer information that enhances services, it is important that your sale reps and other internal/external staff find the system intuitive, smooth and easy to use. This will ensure as to how much they add on to company's information database, tallying crucial information that creates a rich resource for future transactions and customer base.

Integrating systems required by sales and customer service is very crucial for CRM success. Most sales and marketing teams turn into CRM evangelist, turning CRM systems into a valuable system that contributes to their overall success, generating increased profits for your company. It helps to involve multifunctional teams in deciding the right solution from the onset. CRM is not about jazzy designs and neat looking graphics, its about the features, technology, functionality and system integration that practically adds value to overall customer experience in relation to your company.

Your focus should be driven towards a simpler solution—native to company hardware and OS—deployed on an existing setup, one that requires no new IT skills, avoiding additional costs for CRM solutions. Intuitive and user-friendly solution that offers easy and quick access allows easy customization and has a brief learning curve combined with superb set of features and functionality, a system that provides quicker and less expensive integration in the initial stages.

It is ideal to have a few members from the IT team, and their vote in the decision will ensure the shortcomings and practicality of the new solution. Allow all points to be discussed freely, for this system is not meant just to flaunt features, it needs to be practically viable in everyday use and be compatible with existing platform and environment, like ERP and other important back-end applications. It is safe to have an IT personnel check integration and compatibility along with the order entry system, which is very crucial for customer service.

2. Platforms & Important Considerations

Where does your master customer data lie? If you have it stored on a Linux system, it does not make sense to install a Windows system that may be incompatible and difficult to integrate and uphold. It makes sense to have the two systems on same platform, as this will enable more time-sharing of data between the applications, saving you and your staff 'time', also increasing the overall efficiency of the system. A good example would be to consider flexibility in cases where two 'systems' can't interact, and a client needs to know about his current account information.

Similar platform could be the next important factor where the production controls system; order entry system and inventory are all in place. These crucial and vital factors can help you save a great deal on IT staffing costs, inefficient handling of data, compatibility and productivity, initially, when saving costs really

matters. Your investment should be planned for today, to flexibly serve you tomorrow. This is how you make a wise and technically sound decision for your company & its overall CRM-objective.

There is sometimes a great deal of confusion over the GUI front-end system. Do not allow yourself to be sweet-talked by a sales rep into changing your current ERP system, when you can actually opt for the right CRM system compatible to your existing ERP software. Some times, just upgrading your GUI can help in easy accessibility by providing remote entrée to the existing customer database.

3. Your Debate over the Right CRM solution

The right CRM solution

- X** Relieves from uncertain results, downtime & user confusion
- √ Offers easy-to-use systems that save precious man-hours in retraining staff
- √ Back-end infrastructure, preserving systems that work fine

4. Data in more than one database?

Consolidation seems like a sensible option where data is stored on more than one platform. You can integrate data on the platform that has the most critical customer data. Customer master database should decide the course of action in such cases; say if you hold vital customer details on Unix, it makes sense to have a Unix-based CRM solution. Let us not forget that real-time data from internal sources forms a major part in determining the success when it relates to service.

Measure success by the ability to deliver results. For instance, if you can promise a customer to deliver his shipment by a certain date, as you get to access the inventory instantly, the order is established and so is customer satisfaction, efficiency and loyalty over the service rendered. Delay, or chances of in access to important information in timely manner can lead to loss of business and gain by your competitor. You don't just lose a customer, you also lose out on efficiency and the overall objective of having a sound CRM system—winning a customer! Brand building is important, and so is swift service, its policy of the day.

If your CRM system with its latest technology and integration skills can produce excellent results, be it by means of a bulk e-mail campaigns generated for targeted customers, or immediate customer service in form of easy assess and multiple-sharing of information by internal staffing, at a minimum costs, you have succeeded in your aim. Target marketing and customer-oriented services, if chosen rightly, is capable of doubling the sales, sale leads and in decreasing customer service expenses.

5. More on CRM: Return on Investment

Other sources of return on your CRM investment can come from:

- Voluminous handling of information and efficient customer interaction
- Enhanced tracking system: better follow up and higher closing rates
- Customer loyalty: Better customer satisfaction results in better sales and repeat business
- Detailed customer data allows highly skilled and targeted marketing
- Reduced advertising/promotion/marketing expenses
- Better targeting and forecasting turns into urgent sale opportunities
- New CRM marketing tools such as bulk-emails and special offers help win new business at little or no cost

- Integration benefits: Integration of sales, customer service and accounting, customers can rely on the information more confidently
- More control on lost orders due to human errors: a well -implemented CRM solution not only ensures order and efficiency for short period of time, it pays on a long-term basis

6. The winning formula to CRM success...

There is no general line you can apply to the success of a general CRM solution for your organization. However, identifying the area of focus, and integrating it with your back-end data using latest technology and features looks like a good beginning. But the real challenge lies in making the real-time users aware of correct practice, potential and functionalities the solution has to offer, to capitalize on optimum usage and rewards. After all, company staff will ensure the right deployment of the system to generate better business opportunities. What will eventually ensure success is easy accessibility, features, positive interactions and a well-integrated system that helps in building the foundation to your company's overall CRM policies. A good CRM system has the ability to draw measurable benefits in terms of customer, employee and organization satisfaction, ROI and overall success ratio.

About Boss CRM

BOSS CRM (<http://www.bosscrm.com>) offers you the most comprehensive Customer Relationship Management (CRM) solution to streamline the customer qualification, acquisition and retention process. BOSS CRM helps organizations large and small maximize marketing effectiveness, accelerate sales processes, enable single view of customer, lower operating cost and improve customer satisfaction. BOSS CRM is created, designed and optimized with the marketing and sales departments in mind. Our products and services simplify the customer identification, qualification and acquisition process, allowing your marketing and sales departments to focus more of their valuable time and effort in efficiently reaching the best and most effective customers. BOSS CRM, a division of Sohodo, Inc. is a leading provider of easy-to-use, on-demand applications for contact management, lead generation, online group calendar, tasks management, marketing campaigns, document management and helpdesk. Headquartered in San Jose, California. Sign up for free CRM trial at <http://www.bosscrm.com/free-crm-software-trial.html>