



# Taking your CRM beyond the sales team

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Relationships, not transactions, are what B2B customers crave. While transactions end at the sale, relationships use every interaction to improve each buyer's experience, and they enable you to build profitability by delivering an exceptional customer experience (CX).

If you are frustrated that your company's approach to relationships is pothole-laden, don't sweat it. The majority of companies still struggle to produce a smooth customer experience.<sup>1</sup> While "82% of companies identify the customer experience as a competitive differentiator,"<sup>2</sup> only "6% of enterprises are currently capable of seeing the entire breadth of their customers' experiences."<sup>3</sup>

To build customer loyalty, gain a competitive advantage, and capture more revenue, companies will need to invest in increasing employee adoption of, and proficiency with, CRM best practices.<sup>4</sup> Many companies have implemented some CRM capabilities, yet companies continue to leave an estimated \$1.6 billion in revenue on the table by delivering a subpar customer experience.<sup>5</sup>

## The road to CX excellence

When a single negative interaction could result in completely losing a customer or prospect forever, each and every touch point needs to be handled with great care.<sup>6</sup> Dropping the ball or winging it aren't options when your company's success hinges on a smooth customer experience.

"Modern CRM can only be successful if the foundations for sales, marketing, and service processes and technology are solid."<sup>7</sup> The aim should be to measurably improve the customer experience by achieving outcomes that can be benchmarked and measured.<sup>8</sup>

**"Celebrate and reward good practices and behaviors, not just sales. While sales organizations commonly use recognition programs, they rarely use these mechanisms to reward excellent CX practices."**

**Ryan Hart, Principal Analyst, Forrester Research Inc.**

## Avoid roadblocks

According to Forrester, these are the top four roadblocks that stand in the way of CX success: strategy, process, people, and technology.<sup>9</sup>

To improve customer loyalty and revenue with CRM, companies must invest the time upfront to define measurable objectives, eliminate interdepartmental silos, and gain buy-in and change management support from executives throughout the company to ensure all employees use, update, and benefit from CRM best practices.

## Align cross-departmental efforts

When you think of CRM, the sales department probably springs to mind. It owns the customer, right? While this is true to an extent, it goes a bit deeper. If only sales is capturing, accessing, and updating customer information in a CRM solution, important opportunities are being missed.

In addition to sales, marketing and customer service could also benefit from real-time visibility to rich customer profiles and interaction history as well as the ability to update the most recent customer interactions with your company.

Here is how a CRM can benefit each part of your customer-facing team:

**Sales** gains real-time insights into customer activity that can be used to recommend relevant cross-sell and up-sell opportunities.

**Marketing** uses the treasure trove of fresh customer data with the CRM solution to craft timely and targeted marketing messages that have a better chance of driving activity.

**Customer service/support** provides a seamless experience that reduces the need for a frustrated customer to explain their situation multiple times throughout the problem-resolution process.

**Executives** can use real-time customer data to determine which programs, services, and initiatives to invest their time and energy in sponsoring.

## Connect the wires

Rocky customer experiences are rampant, and with each added point of friction, B2B companies give their customers another opportunity to disengage.

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A major barrier to company-wide adoption of CRM is that each team—sales, marketing, customer service—chooses its own tools without considering the needs of the other.

Source: [DestinationCRM.com](https://www.destinationcrm.com)

A major challenge with traditional CRM is that each team that stands to benefit from a CX tool—sales, marketing, customer service—chooses its own tools to suit its own purposes, not considering the needs of the other departments or how the information will ultimately be aggregated and made available company-wide.<sup>10</sup>

To improve the sales experience for customers and employees alike, companies must fight the urge to implement disparate systems that can't work together as one. Furthermore, they must work together to collectively improve every employee's ability to view and positively influence each touchpoint in the customer experience.

Yet when asked how widely data insights are shared across their companies, only 3% of executives feel that individual employees "are fully empowered to make and influence change."<sup>11</sup>

## Abandon old ways of thinking

Forrester predicts that “by 2020, every business will be either a digital predator or digital prey.”<sup>12</sup>

Digital predators “use digital assets to drive revenue by helping customers achieve outcomes,” whereas digital prey “are much more likely to see digital as a way to enhance the firm’s existing business model, without fundamentally changing how the firm creates value for customers or drives revenue.”<sup>13</sup> When it comes to embracing time-saving and revenue-elevating technology, is your company predator or prey?

A company’s ability to stay relevant and successful, therefore, will largely depend on its aptitude for discarding legacy technologies and ways of thinking to forge new paths that streamline the customer experience.

## Rev up customer success

According to Denis Pombriant of Beagle Research, “globally, businesses spend about 6.2 trillion dollars due to customer churn.”<sup>14</sup>

As companies grow larger, and delivering a consistent experience across an increasingly complex web of products becomes more difficult, B2B companies are launching customer success initiatives to help customers navigate growing complexities and find success using their products and services.

“The megatrend of customer success is breaking down the barriers between sales, marketing, and service,” explains John Ragsdale, vice president and research director at the Technology Services Industry Association (TSIA).<sup>15</sup>

In essence, a customer service professional could be empowered to up-sell or cross-sell a solution while a sales rep could direct a customer to a helpful marketing eBook. Instead of working in silos, everyone who interacts with a customer is empowered to provide the help that’s needed.

## Improve customer experience with CRM

CRM can assist in this process by enabling anyone in your company who interacts with customers to review the latest interactions the customer has had with your company and act accordingly to deliver a more personal experience.

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The megatrend of customer success is breaking down the barriers between sales, marketing, and service.

Source: [DestinationCRM.com](http://DestinationCRM.com)

For instance, if a sales rep can see that a customer is in bad credit standing, she can avoid pitching another solution to that customer until they’re in good standing again.

Conversely, if a customer calls in to your support complaining about their employees being unable to access the product, your support representative could look at the customer’s profile and see that they’ve only purchased 5 licenses of your product, but are attempting to use 12. By quickly identifying the problem, the support rep can then suggest the purchase of additional licenses—or deactivation of inactive employee accounts—to remove the bottleneck.

Overall, CRM fuels customer success initiatives by enabling employees to resolve customer issues faster. When adopted company-wide, CRM can give employees the information necessary to solve a customer’s issue at the first point of contact, rather than bouncing the customer from person to person across the company like a ping-pong ball.

## The payoff

While implementing and fine-tuning CRM for your business can take years to pull off, the payoff makes the undertaking of this journey a no-brainer.

## The race to value

Two-thirds of large companies are already using CRM.<sup>16</sup> Now entering a stage of maturity, CRM technology has been around for more than two decades, and smaller solutions are being eaten up by larger companies looking to deliver a more comprehensive CX platform.<sup>17</sup>

Even amid mass consolidation in the CRM space, lightweight vertical solutions are gaining popularity. They do not necessarily script a process end-to-end, but offer templates, workflows, data model extensions, and UI labels. This helps users focus on delivering capabilities that differentiate their business in the marketplace.<sup>18</sup>

That being said, companies should ensure any lightweight solution they consider adding is scalable and can benefit the entire companies, not just sales.

To truly deliver the seamless customer experience that results in massive revenue gains, Forrester says “Companies must form an emotional bond with their customers by looking out for their best interests, identifying points of friction in a customer journey, and empowering customer-facing personnel.”<sup>19</sup>

Confirming the importance of these behaviors, “72% of customers say that valuing their time is the most important thing that a company can do to provide them with good service.”<sup>20</sup>

### Investing in CX delivers:

- Greater customer loyalty
- Greater revenue growth
- Acceleration of process efficiencies
- Quality improvements

Source: Forbes Insights: Data Elevates the Customer Experience

To join the 30% of companies that are harnessing every customer interaction to create a better customer experience, companies must focus on eliminating departmental silos, implementing standard CRM operating procedures, getting everyone to use the same CRM platform and best practices, and committing to continuous improvement.<sup>21</sup>

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**30% of enterprises are already using data-driven CX to significantly improve customer interactions with their brand.**

Source: Forbes Insights: Data Elevates the Customer Experience

## Shift gears smoothly

Moving your customers through your service teams should be executed as smoothly as an expert driver shifting gears in a high-performance vehicle. The goal is to make these hand-offs so seamless that it all feels like one consistent experience for the customer.

By putting everyone in your company on the same page, CRM positions your separate, customer-facing departments to work together as one team and deliver a seamless experience, regardless of the channel being used or the individual employee delivering service.

CRM can give every customer-facing employee in your company access to the same platform and customer profiles. All employees are empowered to help resolve customer issues faster and provide a more consistent and positive customer experience.

CRM can help you communicate to customers with one voice across your company, improve customer satisfaction, reduce customer churn, create a more consistent experience across channels, and discover opportunities to upsell and cross-sell additional products and services. When fully adopted and continuously enhanced, CRM can drive a greater CX that accelerates revenue growth.

To learn more, visit [infor.com/crm](https://infor.com/crm)



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