



## Customer Relationship Management



### What is CRM?

CRM or Customer Relationship Management is a business philosophy requiring all elements of an organisation to be co-ordinated around a customer's needs and interactions.

### Computer Software

CRM is not about buying a software package and expecting it to transform your sales and marketing activity. There are however software products such as ACT! from Sage which can help in co-ordinating information and activities, but they do need to be part of an overall system.

### Centralised Information

Businesses often suffer from having information about clients, targets and business contacts in various locations. This means it is very difficult for anyone to know what is going on at any particular time. It can also lead to gaps in information and duplication of effort eg. clients receive multiple copies of a newsletter or even worse, don't receive one at all.

A system like ACT! can pull all of this information together into one place. It is then available to as many people as you like, no matter where they are located.

### Recording Activity

It is then simple to record any activity against individual clients or groups. Any profile information, details of phone calls, meetings and quotes and copies of letters or emails can all be recorded against individual clients.

### Campaign Building

One of the strengths of systems such as ACT! is that they can really help to develop effective marketing campaigns.

It can easily develop lists for marketing activity based on any criteria information which is stored on the database eg. geographic location, turnover, business type.

It also enables the simple merging of information to create personalised letters or emails which can then be carried out at the click of a button. The system can also prompt you at the appropriate time for follow up emails or phone calls etc.

### Measurement

By recording each activity and the outcomes of these, you will quickly be able to measure which marketing activities work and which don't.

This concept can be extended into the sales process to measure individual and company performance.

### Forecasting and controls

The system can help in sales forecasting by setting the likelihood of prospect conversion at each stage of the sales process

It can also prove to be a great management tool in checking that contact objectives are met and measuring staff performance, as well tracking where leads come from.



## For further advice and assistance

please speak to your normal Monahans contact or get in touch with Check-Tek, Monahans IT support division, who can assist with the installation and maintenance of all sorts of computer systems and software.

Call them on **01793 480022** or email on **swindon@check-tek.co.uk** to find out more.