

Why CRM Isn't Just For Sales

Operational Technology For Your Business



Transforming Businesses with Salesforce



MEETING THE CHALLENGE

“Our customer experience needs to improve, and technology is one tool that can help. It can be a **paradigm shift** in how we operate our businesses in this new digital world”

For most organizations, transitioning to new ways to engage with their customers represents a significant cultural change. Proactive planning and management are essential. The right technology will make it possible. Most organizations understand that CRM systems make it easier to manage their sales activities and pipeline, but what happens after the sale?

One of the biggest challenges is the wide range of stakeholders and variables involved in this new ecosystem, many with differing priorities and objectives. All must work together seamlessly to deliver higher customer engagement with a faster response time and with less resources. This means organizations must implement a workflow and process management system that can automatically and pro-actively engage customers and create collaboration between departments – from marketing to sales to operations to accounting. A technology strategy that focuses on operations and managing the *customer experience* from first touch point to the multi-year anniversary of the first sale to the customer is critical for meeting the expectations of customers today.

The big challenge is how to achieve success in all these areas. The good news is, technology is now available or being developed to provide the path to success.



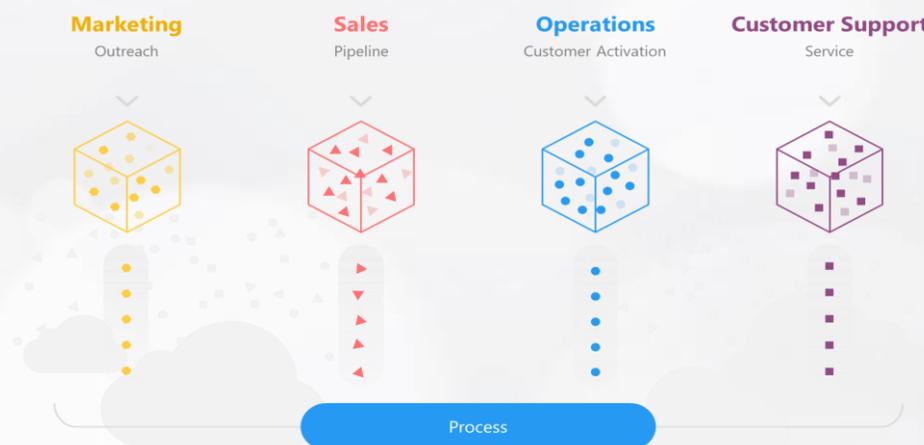
“Silos and
Roadblocks
across organizations
prevent effective
Collaboration
within our organization.”

COMMON ROADBLOCKS

Even though most executives strive to be a customer success driven organization, there are many barriers that can hold them back. Here are the most common roadblocks we see in organizations making the transition.

1/Data Silos

Most organizations have invested, at some level, to improve within their own systems, but implementing an end-to-end customer engagement platform seems “expensive”. The reality is having a separate system for customer acquisition and marketing that is different from the sales team’s pipeline and prospect management system creates the need for manual entry or integration between these systems. Additionally, once the sale is made, a separate customer support system for answering customer questions and providing support create yet another silo of data and systems that need to be managed and customer data is not in sync. “It is one thing for employees within the same organization using the same systems to successfully share data. Integrating data across multiple, disparate systems is something else altogether.” Having a core operational platform that creates a single point of truth for all stakeholders is key, as is having the capability to share data with customers when needed.



“More data everyday equal to the rate of the past

thousands of years of

humanity. Yet, less than

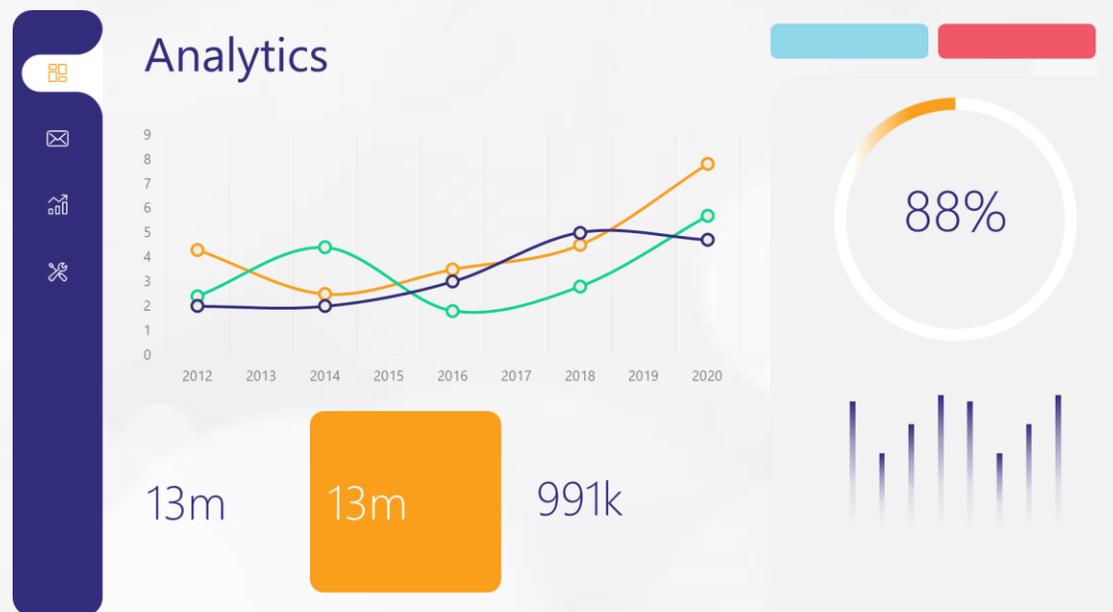
much of that **data** is

going unused and is not analyzed for operational decision making.”

2/Tracking and Reporting

With all this data in various system and every customer interaction tracked, it should be easy to know what next steps are necessary with our customers. That is usually not the case because the collection of data is separated from the analysis and reporting of data on our customers. Knowing the customer’s needs proactively is necessary to really provide a customer-centric experience and take your company to the next level. Seamless reporting capabilities across the entire operations is key.

Having a single source of truth is the first step. But you also need an easy way to identify, compile and transfer the necessary data for customer—from initial engagement to renewal or the next positive support experience. But then, you need a robust reporting and dashboard capability within your CRM to highlight the areas of focus so your team can be proactive in outreach and customer service.



“Technology should
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3/Communication

Most traditional systems are not aligned with changing requirements, and this is particularly evident in communication. From customer satisfaction surveys to education to outreach, communication is integral to tracking and improving customer experience. But as you build relationships and stay true to privacy regulations, you also have to understand the limits of what personal information can be shared. The right security technology within your CRM system can make both goals possible.

Regular communication and active relationship with customers is essential. Promoting open communication often represents more than a new requirement; it is a new way of thinking about your business. Even if you have the systems in place, they may not be set up to meet today's demands. An effective CRM system can serve your marketing, sales, and operational processes and customer engagement through the lifecycle and help to grow and scale your organization without the overhead required by manual processes.





Transforming the Businesses with Salesforce

Advancements in CRM technology are not new but the rate of change resulting from today's customer expectations of technology is profound.

It is critical to choose the right CRM technology based on a unified platform, flexible and scalable for tomorrow's challenges. If you compare what most organizations are paying for separate marketing, sales, operational and customer support systems, a CRM platform like Salesforce is not only a cost savings but a growth and revenue accelerator. Once in place, a CRM platform will break down data silos, support efficient operational management, allow tracking and reporting for better decisions, and offer real-time secure communication resulting in a system based on transparency and trust – sure to transform the customer experience and your business.