

# Customer Relationship Management (CRM)

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Department of Success

# Components of prospecting

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- Lead generation system
  - Marketing campaigns
  - Networking

- Database
- Lead conversion system
- Customer retention system

**CRM**

# Customer Relationship Management (CRM)

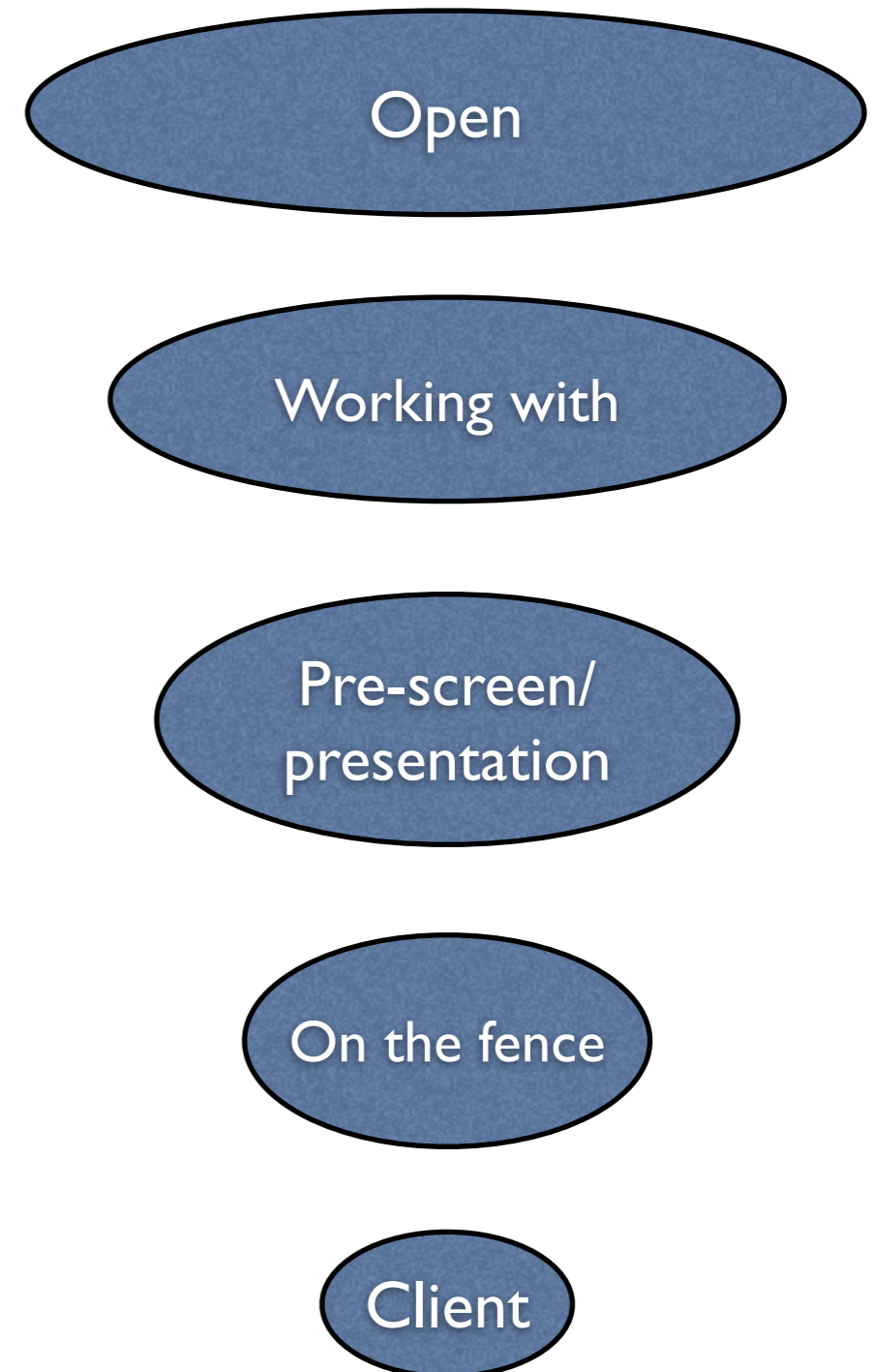
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- *“...the practice of intelligently finding, marketing to, selling to, and servicing customers”*
- Utilizing systems to provide personalized customer service
  - Sales force automation (lead conversion)
  - Marketing (campaigns)
  - Service/support (cases)
  - Analytics
- \$9.1 billion industry in tools alone (2008)
- Application vs. hosted database solution
  - Automation
  - Integration with other applications/services

# Data to Track

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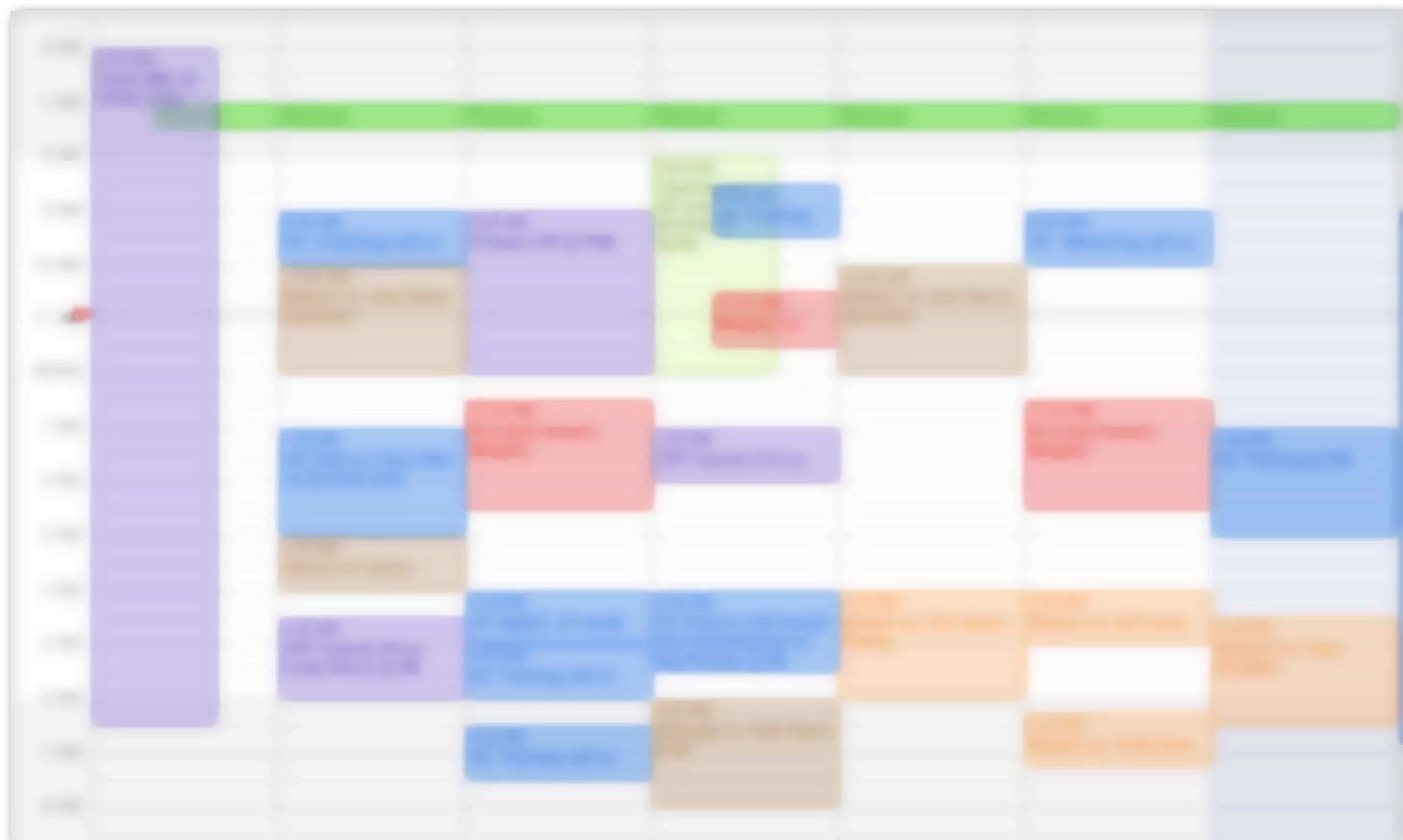
- Basic contact information
- Qualification (need/desire)
- Date/activity history log
- Pipeline status/funnel
  - **Open**
    - Names/community list
    - Leads (purchased, advertising)
  - **Working with**
    - Review web site, brochure
  - **Pre-screen/presentation**
    - Informal intake, needs assessment
  - **On the fence**
  - **On the fence**
    - Ready to schedule session
    - Slow drip



# Data to Track (2)

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- Appointments
  - Day Planner
  - Calendaring/PIM software
    - Outlook, Entourage, iCal, Now Up-to-Date, Google Calendar
- Business/campaign Expenses
  - Organize by category
  - Comprises **tax journal**
    - Paper ledger
    - Quicken, Spreadsheet



# Customized Sales Model

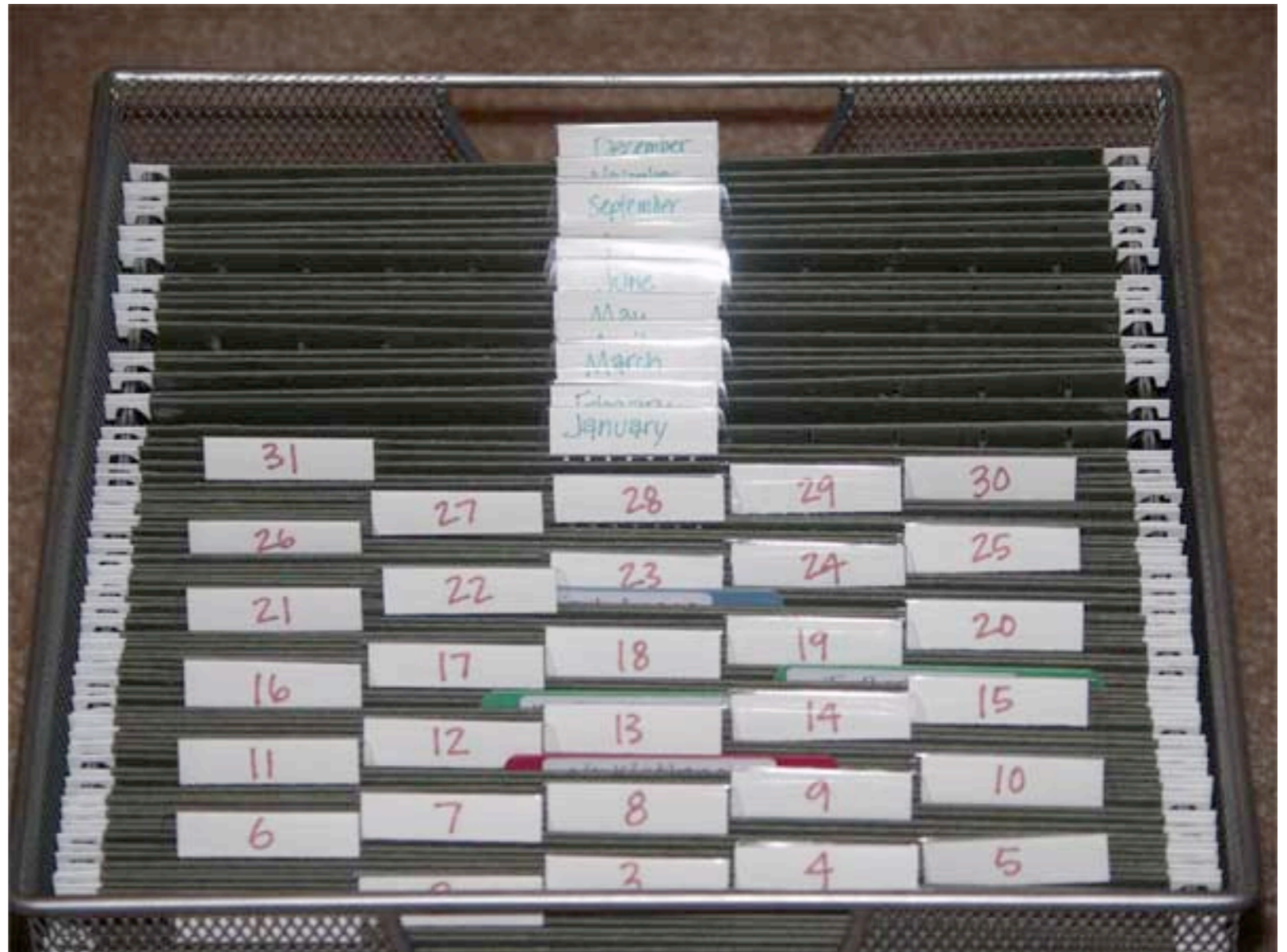
- Process of influence for all prospective clients
- Identify pipeline phases specific to business
- Close = “sweet spot”
- Follow-up till “buy or die”
- Professional persistence, maintain rapport
- Client retention activities



# CRM implementation

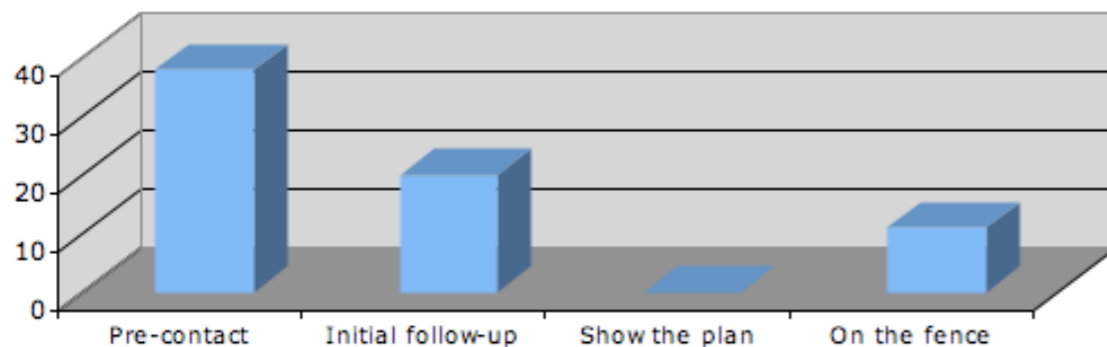
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- Paper-based:
  - Address book + files for activity history
  - Very inexpensive
  - No integration with other services
  - No backup
  - No reporting
  - Limited portability



# CRM Implementation (2)

- Application solution #1:
  - Simple tracking spreadsheet + PIM software
  - Simple, free (Excel/Google Docs + Outlook/Address Book/Gmail)
  - Limited reporting functionality and integration with email, webhosting



A screenshot of an 'Address Book' application window. The window title is 'Address Book' and it has a search bar containing 'ipsb'. The main area is divided into three panes. The left pane shows a list of groups, with 'All' selected. The middle pane shows a list of contacts, with 'IPSB' selected. The right pane shows the details for the selected contact, including a name, phone numbers, address, and a note.

Group	Name
All	Cordelia Brown
Directories	Doug Carter
Biz Support	Kasey Davis
Cold leads	Kate Henriouille
Colleagues	Catherine Hubbard
DL-ACTIVE	IPSB Info
DL-SD	IPSB Board Members
Email filtering	IPSB
Family	Robb Latimer
Friends	Petar Miric
GRA Training Cmte	Cindy Nauta
Home Improvement	Eugenie Newton
LEHA	James Stewart
Mail	Bill Sutton
Past Life	
Personal	
Potentials	
RB Clients	
Relatives	
Restaurants	
Usana Support	
UNFILED	

**IPSB**  
IPSB

work (858) 505-1100  
main (858) 490-1154

work 9025 Balboa Ave  
San Diego CA 92123

Note:  
8/04 - started Essentials  
9/04 - started HHP  
7/05 - finished HHP  
9/06 - first TA job

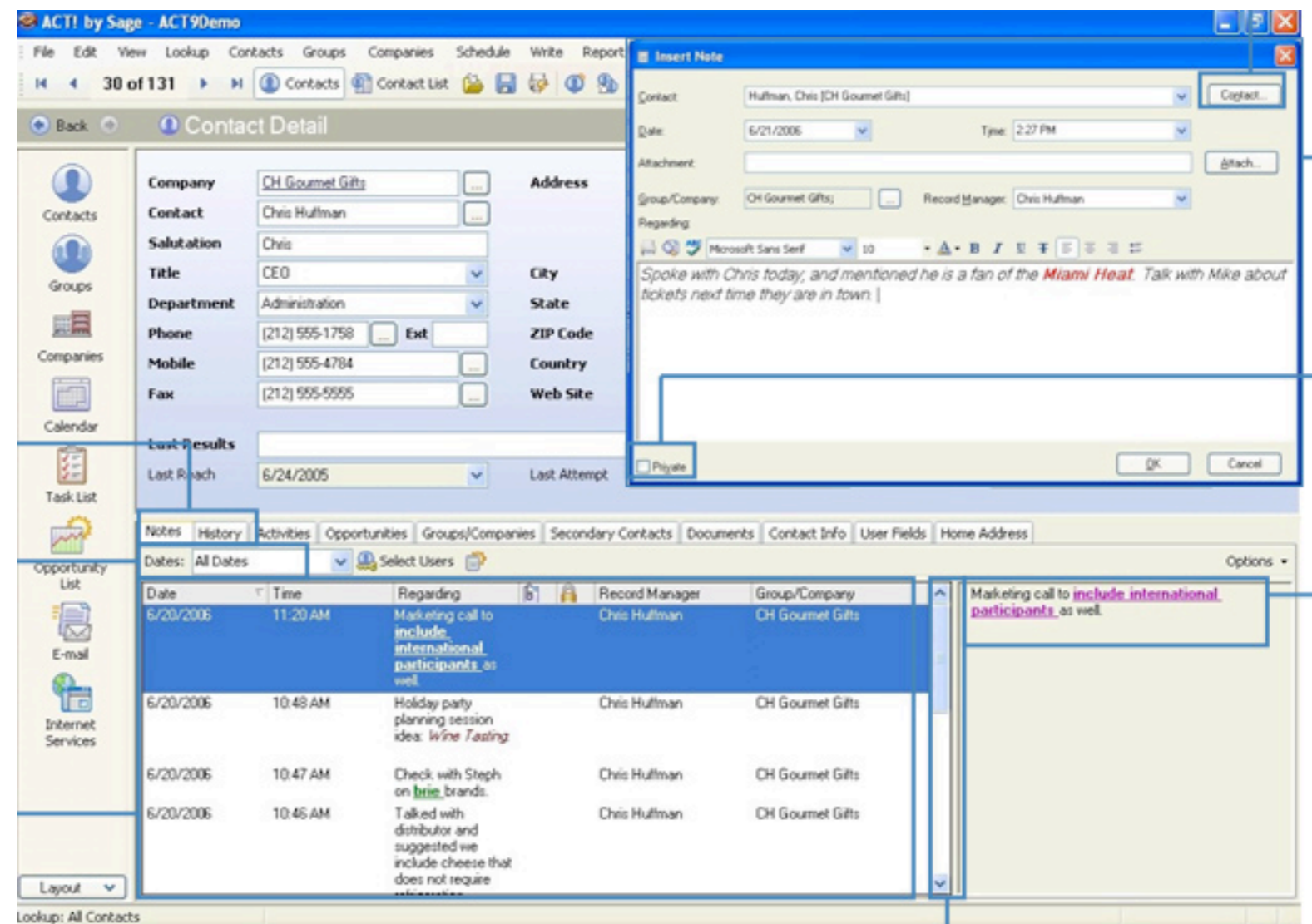
Updated: 5/5/08

14 found



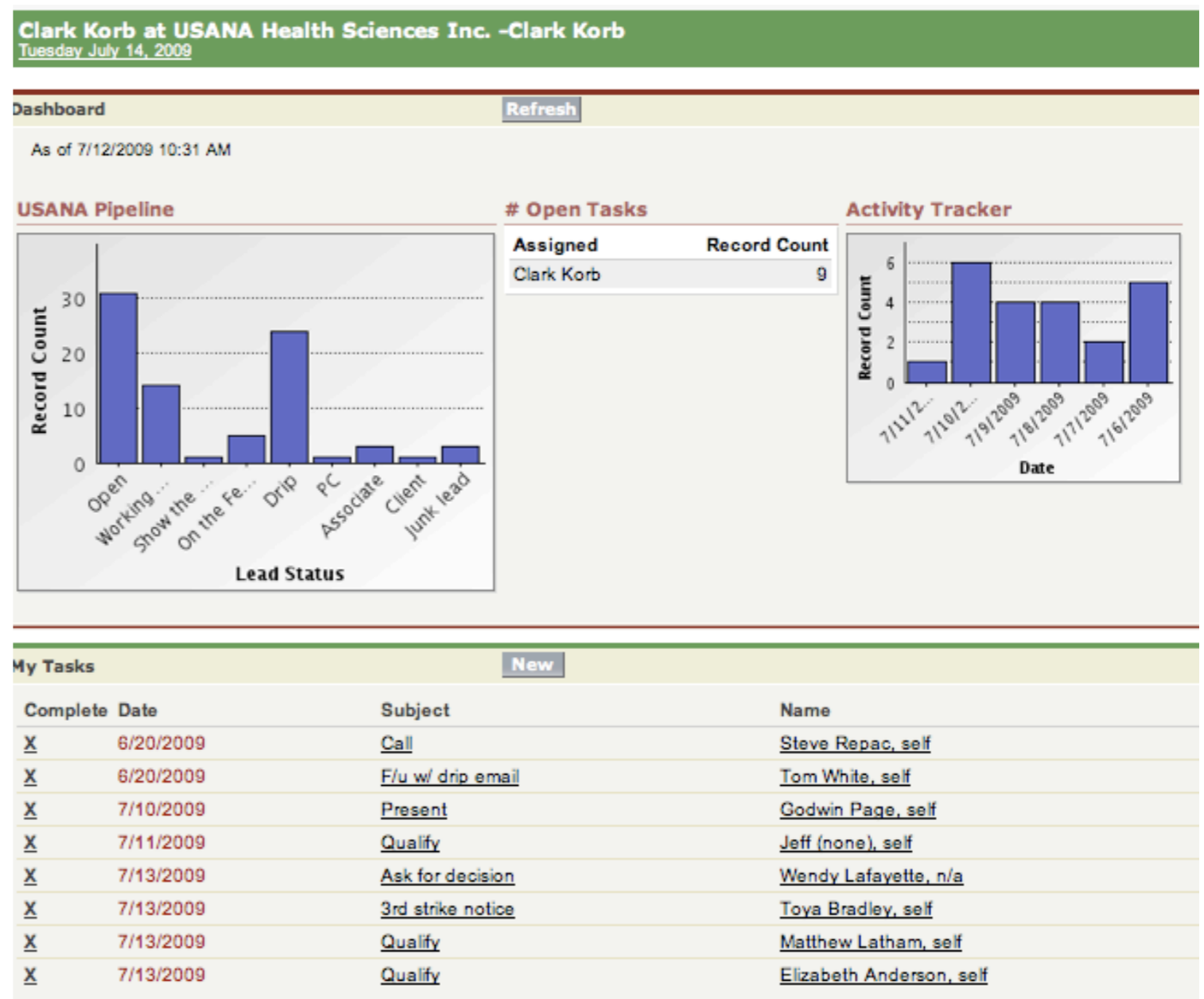
# CRM Implementation (3)

- Application solution #2:
  - Custom database software (ACT, Daylite)
  - Larger initial/infrequent expense
  - Improved reporting
  - Limited integration with email, webhosting



# CRM implementation (4)

- Hosted implementation:
  - Online service
  - Small periodic subscription
  - Easily customized
  - Interfaces well to email, webhosting
  - Vendors:
    - Salesforce (salesforce.com)
    - Batchbook (batchblue.com)
    - Zoho CRM (crm.zoho.com)
    - FreeCRM (freecrm.com)



# Class project requirements

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- Demonstrate CRM tool/process implementation:
  - Enter warm market names list into database ( $\geq 10$ )
  - Define and show reporting/sorting pipeline phases relevant to custom sales model
  - Identify activity history tracking log
  - Illustrate timeliness capability (reminder/dashboard)
  - Schedule initial contact of preliminary leads ( $\geq 10$ )
  - Provide hardcopy or electronic screenshots of system