

# TIP #1

## Make CRM A Basic Strategy For How You Do Business

# CRM TIPS!

By RB Data Services

**CRM IS MORE OF A BUSINESS STRATEGY THAN A TECHNOLOGY.** It's really a methodology for how to do business. The successful project allows you to focus on how to use technology to serve your customers better. You can analyze, refine and automate your business processes so that while there will still be a difference between the results your superstars and non superstars achieve, this will significantly narrow the gap.

An example of this might be to develop specific business processes that handle exactly what you want to do every time a certain business event occurs like acquiring a new customer. Maybe you have discovered that the life-time value of your superstar salespeople's customers is literally triple that of your non-superstar salespeople. Perhaps part of this reason for this is that your superstars consistently do things that your non superstars do not. Maybe your superstars do the following every time a sale is made to a new customer: send out a thank you letter immediately; wait thirty days and then send out a customer satisfaction survey; wait a week and then call to follow up and make

completely happy with the purchase and ask for referrals; and finally begin sending them your quarterly newsletter. Maybe these are things that the non-superstar know that they are supposed to do but they just do not always get them done.

Leaving this up to the individual salespeople to do themselves without having any tools to reduce the burden makes it so that its execution becomes sporadic at best. You could have your CRM system do all of the above actions automatically with the exception of actually making the call. If you view the call as a critical part of this process then the CRM System can be designed to alert the salesperson's manager if this call is not made within a reasonable amount of time. This closed loop methodology makes sure that everyone does what they are supposed to do in order to better serve the customer.

For a complete list of tips visit [www.rbdata.com/crmtips](http://www.rbdata.com/crmtips)

If you'd like to receive these tips by email please send an email to [crmtips@rbdata.com](mailto:crmtips@rbdata.com)

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*Another timely tip to grow your business through better customer relationship management*