

Expert advice and guidance from the  
**ICT Sector**

# CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

## MEET OUR EXPERT

**Don Wiid**  
Contact Edge CRM



Don has spent over 10 years working with CRM systems and has written add-on programs that have sold around the world. His expertise as a business analyst and software developer mean you can be confident that Don will design a CRM strategy that can transform the success of your business.

Every project we do has Don's personal attention, backed up by a project team of four and a 100-strong technical team to do configuration, installation and software development.

Before going into CRM, Don was an agronomist working for Astra Zeneca in South Africa. The balance of technical and personal skills required to deal with his farming clients made this an ideal training ground for what he does now.

Would you like to get involved with our ICT Sector? Do you have ideas for future events or expertise to share in a guide like this?

Please get in touch with Helen Bosett, Sector Co-ordinator at Cambridgeshire Chambers of Commerce on 01733 370809 or email [h.bosett@cambsscci.co.uk](mailto:h.bosett@cambsscci.co.uk)

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## CRM - a must have technology

Unless you have a very small number of customer (and want to keep it that way), CRM is a must-have technology. It helps to optimise marketing, sales and customer service, ensuring you attract, win and retain more customers.

It seems an obvious business goal – to get more customers – yet CRM remains an under-used technology.

The reasons are difficult to pin down. While there is increasing awareness of what CRM is, many people seem to think that it is at best a glorified spreadsheet to hold customer contact details.

## Dispelling the myth

CRM Systems have matured tremendously over the last few years, with hundreds of systems available.

Early systems like GoldMine and ACT unfortunately have not kept pace with newer, cloud-based systems, and functionality is poor. In contrast, modern systems are easy to use, can be accessed from anywhere, on any device – be it a PC, MAC, smartphone or tablet.

## 5 signs that you need CRM

- 1 Your contacts are all over the place**  
With contacts in multiple spreadsheets or on paper, it is nearly impossible to do marketing and sales effectively. How much effort is it to get a Christmas card list together? Does that mean you won't get around to doing it?
- 2 Sales opportunities are falling between the cracks**  
Without a system to help you follow up in a timely manner, many opportunities will be lost. Are you randomly following up low-value opportunities, instead of high-value, imminently closing opportunities? Are quotes being followed up, or is it down to someone remembering to do it?
- 3 Your sales people are out of control**  
If you have sales people with their own 'system', it is potentially a high risk. What happens if they leave? Can you ensure that – through training – all your sales people become top performers?
- 4 You find it difficult to measure return on marketing investment**  
Do you exhibit at events and afterwards wonder whether it was worth it? Do you run ad-hoc marketing campaigns without clear evidence of generating leads?
- 5 Customer service is at breaking point**  
Are you over-reliant on one star-employee who seems to know everything about your customers and their issues? Does it feel like firefighting, coping with the daily deluge of customer queries?

## 5 tips to get you up and running with CRM

- 1 Go for cloud-based systems**  
96 per cent of businesses vote for cloud-based systems, citing flexibility and availability as top factors.
- 2 Adopt a growth-mindset**  
CRM introduces new concepts such as leads, opportunities, activity management and more. There will be users who want to give up, but if you persist it will become second nature.
- 3 Make sure you understand what success looks like for you and prioritise**  
Be clear where CRM can improve efficiency now, and later on, when everyone understands how CRM helps them and the business as a whole.
- 4 Make sure key staff members are involved and management is committed**  
Management can give a strong message: Either it's OK to circumvent the CRM system and use spreadsheets or it's an important business strategy and everyone is expected to play a part.
- 5 Schedule time for training**  
Scheduling dedicated training time signals that you are serious about succeeding. It also enables consistent data entry standards, which in turn means the pitfall of rubbish-in / rubbish-out does not apply to you.

