

# WHAT IF YOUR SALESPEOPLE LOVED YOUR CRM TOOL?

## CRM FOR GROWTH

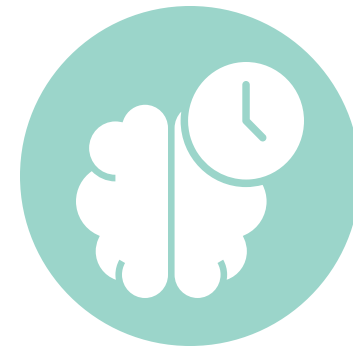


### Growth Mindset

CRM for salespeople to get stuff done not just for sales managers keeping tabs on reps

### Reporting Mindset

Sales can wait as long as we crunch these numbers and keep our bean counters happy



### Make it useful

Only useful information will do

### The devil is in the details

Beware of featuritis



### Think Business

Data serves business vs. Business feeds the data lake

### Business review focus

Who did you design your CRM for?



### A 3-Step Approach

1



involve users in project definition

2



Growth vs. reporting mindset

3



turn the tool into something useful

## X design tips that will make your salespeople love your CRM tool

### LEADS WORKFLOW

Bringing a flow of properly qualified leads to your CRM platform will make it more useful

1

### EASY FOLLOW-UP

Of sales process for CRM to serve as reminder for important sales tasks

6

### SALES DOCUMENTS

Add boilerplates and terms and conditions, standard presentations etc.

2

### CHANNEL MANAGEMENT

When applicable turn CRM platform into collaborative tool for channels and VARs

7

### AUTOMATE

Link useful data to known databases and avoid unnecessary rekeying of information

3

### CONTRACT MANAGEMENT

Client lifecycle information should be kept within your CRM not salespeople's email boxes

8

### SALES REPOSITORY

Bring all useful sales docs to the CRM platform for all to use

4

### CUSTOMER SERVICE

Whenever applicable, link customer service info to CRM client repository

9

### EASY SALES REPORT

Cater for main users and deliver easy useful user-centric reports

5

### MINIMISE ADMIN TASKS

Don't overburden your salespeople with admin tasks, let them focus on sales instead

10

### Numbers that matter

2022 sales stats that matter and amaze

48%

of companies report that improving their CRM Sales Funnel is one of their top sales priorities

source Adam Enfroy

40%

of salespeople still use informal methods like spreadsheets and email programs to store customer data

source HubSpot - '16

29%

Rate by which sales productivity can be enhanced if CRM applications are properly used

source Salesforce

### FACTS & FIGURES

- 91% of businesses with more than 11 employees use a CRM system
- Overall CRM usage increased from 56% in 2018 to 74% in 2019 — tech.co
- Data accessibility for Salespeople shortens their sales cycles by 8-14% - Nucleus Research
- 24% more sales reps achieve annual sales quota with mobile access to their CRM — Aberdeen Group
- Sales agents spend only a third of their productive hours talking to prospects. The rest of their day is allocated to writing emails (21%), entering data (17%), researching leads (17%), team meetings (12%), scheduling calls (12%), training (11%), and reading up on industry reports (11%). (HubSpot, 2019)

REFERENCES & LINKS