



How to boost sales team productivity

To consistently hit sales targets and ensure productivity, sales executives need tools to help them effectively engage customers and close deals. Sales management can reduce the administrative burden by providing accurate forecasting tools and easily accessible, complete customer data. Customer relationship management (CRM) boosts both productivity and effectiveness, yet 22% of professionals don't know what CRM is used for—and 40% still store customer data in a spreadsheet or email.¹

Here are five ways that CRM can increase the productivity of your sales team.

1

Gain a deeper understanding of customers

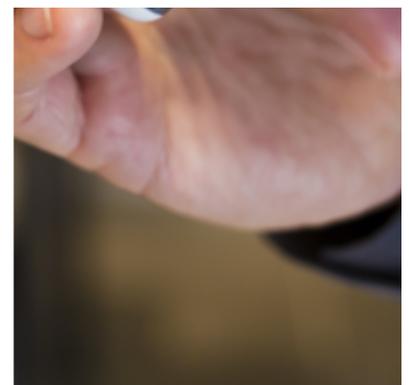
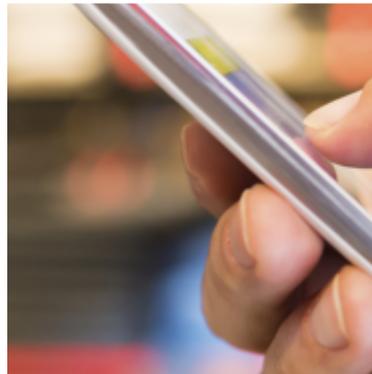
CRM makes it possible to capture many streams of customer information from both internal and external data sources. With CRM, sales representatives can enjoy anytime access to rich, accurate customer profiles that gather information from across the entire enterprise. As CRM has matured, customer profiles now contain much more than contact information and appointments. Robust profiles include demographic data, social media profiles and activity, purchasing history, buying habits, preferred communication channels, and much more.

Rich customer profiles are shared and updated by all customer-facing employees. That means that without picking up the phone, sales representatives can see any activity between accounting or customer service, and their customers. Likewise, customer support representatives can see the interactions that have occurred between the customers and the sales department. The result is a more consistent, satisfying experience for the customer and more efficient interdepartmental communication.

2

Selling on the move

Access to CRM anywhere gives the sales force a strong competitive advantage, especially in the field. Mobile CRM can inform sales representatives about the current status of active orders and available inventory when they are in front of customers, and also allows them to follow up on open customer support issues. With information on mobile devices, sales professionals can refresh their memories just prior to meetings, as well as enter notes and take actions directly after meeting a customer—while details are still fresh. Mobile CRM facilitates better in-person customer interactions and enables the capture of higher quality, more detailed customer information for later sales, marketing, and customer service purposes.



3

Get a 360-degree view

In order for sales representatives to focus energy on the very best customers and opportunities, it is essential to have a complete view of the customer. CRM must integrate with other back-office systems such as ERP in order for customer-facing employees to stay informed. Every interaction with the customer—from marketing to sales to customer service and billing—needs to be available to the sales team.

A 360-degree customer view helps sales professionals avoid looking uninformed or out of touch when they interact with customers. For example, the sales team won't introduce a new product to a customer that accounting has placed on hold due to failure to pay, nor push to sign a big contract when a customer has a major unresolved support issue.

Giving your sales team real-time access to all of the customer and transactional historical data they need from across the business is not as difficult as it sounds. Aside from the information in your CRM system, most of the other critical information for your sales teams resides in the ERP. While more than one-third of CRM users currently lack a unified view of customer data across enterprise systems,² companies that adopt integrated ERP and CRM systems are "75% more likely to have a fully integrated view of all customer information."³

4

Accomplish tasks faster

It's the CRM conundrum: Sales and marketing executives need the system to capture and display every customer interaction, yet data entry is the least productive use of a sales professional's time. Although 75% of surveyed sales reps understood that tools like CRM are an integral part of the sales process, 56% felt the tools were not designed to their needs.⁴

The best way to ensure that sales professionals can be as productive as possible is to choose a CRM system with a consumer-grade user interface that is easy to learn and provides a smooth user experience. An intuitive user interface will increase adoption and use of CRM. By helping sales professionals complete their data tasks with speed and efficiency, CRM will increase overall sales productivity.

A good CRM should not only help sales professionals easily enter data but should also help them identify information and capture it automatically. Many CRM systems are capable of integrating with other enterprise and third-party apps—from email to spreadsheets and social media—saving a lot of time for sales professionals by eliminating unnecessary data entry.

A critical area for this type of integration is the email system. Sales productivity is enhanced when companies choose CRM systems that automatically capture information from emails and share customer information between the platforms, so that entering a name or email address in one platform will display relevant data from the other.⁵

Actionable Analytics

Analytics drive decision making in modern sales teams. Hiring savvy pros with an instinct for closing deals is still important, but it is equally critical to arm them with the data to identify the best prospects and opportunities.

Forrester analyst, Kate Leggett, recently predicted that, "In 2017, organizations will continue to use analytics to prescribe the right action for customer-facing employees in the context of CRM applications. For example, sales teams will use prescriptive advice to identify high-quality leads, the most useful relationships within firms, the right contacts, and the most relevant sales collateral for buyers' role. Sales will also use it for product bundling and discounting to maximize revenue per contract."⁶

CRM systems contain the information your sales team needs to enhance productivity; the challenge is to present data in a format that is easy to absorb and highly actionable. Sales professionals will appreciate the ability to view pre-built, integrated dashboards that combine CRM customer information with relevant data from external sources, allowing them to adapt their sales strategies for success in an ever changing commercial environment.

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1. Hubspot, 8 Stats You Need to Know from the 2016 State of Inbound Report, September 21, 2016.
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3. Aberdeen Group, Nick Castellina, Create a Foundation for Competitiveness with ERP and CRM, August 2016.
4. Accenture Interactive, "Empowering Your Sales Force: It's Not Just Automation. It's Personal," 2016.
5. PC magazine, "The Best CRM Software of 2017," February 28, 2017.
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