

Podcast Script: Collaboration

Welcome to this 60 second Sugar snippet. My name is Susie Williams. Today we're going to follow on the theme of last week's podcast and talk about one aspect of CRM that is very powerful—collaboration. Collaboration means many things, and we'll touch on several areas. We'll describe ways you can collaborate with your fellow employees, with your partners, and with your customers.

Collaboration with your fellow employees takes many forms. One classic use of a CRM tool is to share information about your customer accounts. The sales team, which can be composed of a sales rep, the manager, a technical resource, and other subject matter experts, can all see exactly how the opportunity is progressing. Sales reps can check the calendars of their fellow team members to ensure that the right resources are lined up for that crucial presentation. Sales activities can be assigned and tracked so no steps are missed during the sales process.

Taking this one step further, you can use the Projects module to initiate a project, then monitor its progress within the system. Projects can be created for all customer-facing areas, including marketing campaigns, sales opportunities, accounts, and customer cases.

Using the document management feature of Sugar, you can post your company's corporate presentations, data sheets, and other collateral so your sales reps have all the tools they need to close that sale.

Collaboration also extends to your customers and partners. Using features that are built into your CRM system, you can share information with your partners, customers and prospects. You can create a self-service portal so customers can log support cases, upload relevant information such as troubleshooting diagnostics, and track cases to resolution. Customers can update their own account, contact, billing and shipping address information and can manage their newsletters and email subscriptions.

Another way you can collaborate with your prospects and customers is to start an online meeting to share your computer's desktop. Perhaps you want to present your product to a prospect, or share a Powerpoint presentation with the decision makers. Maybe you are trying to troubleshoot an issue and need to see your customer's PC to diagnose a problem. You can launch an online meeting service such as WebEx from within your CRM system using an optional integration package. Some meeting services allow you to record the meeting and store the recording with your customer record so there's no mistaking what was said or done.

And that's your 60 second Sugar snippet. Goodbye!