Podcast Script: More CRM Usage

Welcome to this 60 second Sugar snippet. My name is Susie Williams and today we're going to talk about some basic ideas to get your CRM solution off to a great start.

In a previous podcast, we discussed ten tips to increase your company's CRM usage, to get your sales folks using the system. Today we'll expand on that concept and we'll provide ideas on how to set up a system that everyone can use, from managers to sales reps.

Let's start with sales reps. What a sales rep typically wants from a CRM system is to enter as little data as possible, as quickly as possible, and to tap into as many leads as possible. In short, they just want to make money! For these folks, show them shortcuts to move quickly through the system. Send out an email or post on a wall the top ten tips you have found to be most effective, from the QuickCreate lead form to the navigation shortcuts at the top of the screen that take you back to your recently viewed items. You can find out more tips and tricks by attending a Sugar University learning session.

Sales reps are going to see value when they see a full pipeline with plenty of data to work on. Make sure you have a process to add leads to the system and to route those leads to the right people. You can easily put a "Web to Lead" form on your company's website which will automatically generate a lead when a potential customer fills out the form on your site. Take note of how many leads are created each week, and publicize this fact to your sales force. In fact, let them know whenever there is a new batch of leads or opportunities added to the system. It will give them a "heads up" to expect the leads in their pipeline, and will promote the idea that the CRM system provides value to them.

Now let's turn to the managers. Managers want to know the forecast, the pipeline, the closed deals and the deals to come. Some managers want to coach their junior sales reps on selling techniques, making sure they have scheduled enough meetings and followup emails and cold calls. Other managers prefer a hands-off approach, focusing more on the "big picture" of how the pipeline looks for the quarter.

You can appease both types of managers with Sugar. For the hands-on types, show them how to view opportunity notes and tasks within Sugar. For the "big picture" types, show them the funnel and the reports available to them. Interview your managers to find out what metrics drive their business, then build reports that they can use and depend on every day. The Professional and Enterprise editions of SugarCRM have reporting features built into the system; for Open Source users, you can download report modules from SugarExchange.com and SugarForge.org. Alternatively, you can use one of the plethora of business reporting tools available on the market to analyze your data further.

We can go on for days, but for now our time is up. We'll feature more ideas in upcoming podcasts. So that's your 60 sec ond Sugar snippet. Goodbye!