

# The Customer Connection

CRM & Social Media for Small Businesses



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As a small business owner, you may be wondering if investing in a Customer Relationship Management (CRM) software solution is worth the expense. It is. CRM can help you to perform better in many different areas that are crucial to the success of your business:

**Customer acquisition:** CRM isn't only useful for continuing good relationships with current customers. The software is a great tool for creating a database of prospects. When combined with a Marketing Automation Platform (MAP), your marketing efforts can become even more effective.

**Customer retention and service provision:** Your existing customers are the most valuable asset you have, so you want to be sure to nurture them correctly. CRM can help you keep customers happy—and gain repeat business.

By allowing you to record information on every customer contact, you can get to know your customers better than ever before. Although a CRM is not a panacea to customer complaints, if a customer complaint occurs you will be better equipped to handle the problem with CRM by your side.

**Developing a social media presence:** No matter how small your business, a social media presence is not optional

## Social Media: A Quick Guide

With so many social media platforms already in use—and more popping up every day—the social media landscape can be overwhelming.

Generally, small businesses should not try to be everywhere. It is more effective to selectively choose a few platforms to focus on.

Facebook and Twitter are desirable platforms for almost all businesses. For B2B businesses, a presence on LinkedIn is necessary. Aside from

in today's world. Social media is a channel to reach out to new prospects and improve relations with the customers you already have. But if the thought of managing multiple social media accounts and feeds sounds daunting, a CRM can help.

Social CRM software includes tools for social media integration that allow you to post updates, monitor mentions of your company and other keywords, and view reports that quantify the effects of your social media outreach efforts. All of these tools, and other features offered by CRM, allow you to refine your social media strategy to maximize results.

**Strategic decision-making:** Ultimately, a CRM solution enables you to make better strategic decisions. Knowing your customers inside and out will help you to make more informed decisions in marketing, product development, and overall business strategy.

Whether you're B2B or B2C, connecting with customers is one of your most important tasks. CRM allows you to do that better and with greater efficiency.

these platforms, however, companies can pick and choose among the following: Flickr, Google+, Instagram, Quora, Pinterest, Reddit, Snapchat, Tumblr, WhatsApp, YouTube.

The platforms you choose to focus on will depend upon your marketing strategy and target markets, so be sure to conduct research to find out where your customers are hanging out online.

Note that a Google+ presence may be more valuable for receiving a boost in Google search rankings than for connecting directly with customers.

# Selecting a CRM Solution

Once you've decided to make the leap to CRM, which software solution you select is of paramount importance. Research your options carefully, with the understanding that industry-leading solutions may not necessarily be appropriate for your small business. When selecting a CRM, keep the following considerations in mind:

- **Usability:** Does this CRM have a simple, intuitive interface? Will teaching employees how to use the software be a relatively short process? While there will be a learning curve with any CRM solution, you want to make sure that the curve won't be too steep. If a vendor you're considering offers a free trial period, take advantage of it.
- **Functionality:** Which features do we absolutely require? Does the solution we're considering offer all of these features? Also consider whether you will be needing additional features in the future.
- **Price:** How much can we afford to spend on a CRM solution? There is a wide price range for CRM software. As a small business, you may not need all of the bells and whistles that come with enterprise-level solutions.

While there will be a learning curve with any CRM solution, you want to make sure that the curve won't be too steep.

- **On-Premises vs. SaaS:** One of the most important decisions you need to make is whether you will be selecting an on-premises CRM solution (installed in individual machines for a licensing fee) or a SaaS solution.

Most small businesses benefit from using a SaaS solution, which eliminates many of the pains of installing and managing the software. SaaS also tends to be more cost-effective for small businesses.

- **Customization:** Will we need to customize our CRM solution to meet our specific needs? How easy can this be done with the CRM program under consideration? While most CRM solutions offer customization options, if you have needs that are highly specific you may benefit from selecting a CRM specific to your industry.
- **Analytics features:** What kind of analytic reports does this CRM generate? How is data collected, and are these reports easy to understand? Pay particular attention to how easy reports are to understand. A comprehensive but incompressible report won't do your business any good.
- **Customer support:** What kind of customer support does this CRM vendor offer? Find a vendor that offers comprehensive support to customers. Especially in the early days as you implement the software, you may need extensive support.

- **Scalability:** Do we have plans to scale in the future? How easy will this be to accomplish with this CRM solution? If scalability is a major concern, a SaaS solution may be preferable.

## CRM and Social Media

Most CRM software solutions offer tools to help businesses to manage their social media presence. Here are some common features to look for:

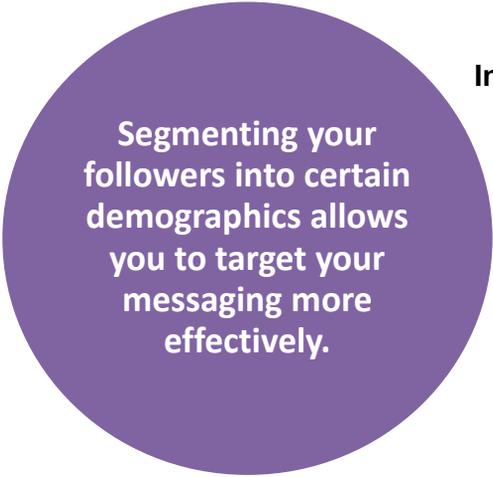
**Social media monitoring:** Many CRM programs offer features that automatically scour social media platforms for mentions of your company. These mentions can then be automatically forwarded to you.

**Social media analytics:** When it comes to assessing your social media presence, there's no substitute for quantitative analysis. This information can tell you much about public attitudes towards your business. However, make sure that you're paying attention to the right metrics.

You can program the CRM to recognize certain questions and provide an automated response every time the question comes up.

**Automated response features:** This is a useful feature if you find that your team is spending a great deal of time answering the same questions over and over again. If this

is happening, you can program the CRM to recognize certain questions and provide an automated response every time the question comes up.



Segmenting your followers into certain demographics allows you to target your messaging more effectively.

**Internal routing:** Some questions you receive via social media will be better suited to certain individuals. In that case, you'll need a system to forward questions to the correct parties. With internal routing features, you can make sure that messages get where they need to go. It's also important that customer service cases can be recorded and closed by multiple parties.

**Marketing integration:** This feature allows you to create subgroups among your social media followers. Segmenting your followers into certain demographics allows you to target your messaging more effectively.

**Contact management integration:** One of the most basic functions of CRM is to record customer and prospect contact information. You'll want to be able to attach social media information to contact records. This feature is especially useful for B2B outreach, where a little reciprocity in social media can go a long way to build good will.

Your business may not require all of these features, but strong social media integration tools are a hallmark of a comprehensive CRM solution.

# Implementation: How the Sales Team Can Use CRM

Once you've selected the CRM solution that's best for your business, implementation is the next step. The implementation process includes training sales representatives and customer service agents. While some employees may initially be resistant to using yet another technological tool, once they learn about everything CRM can do they will come to see it as a valuable tool that helps them to improve job performance.

Some tips for successful CRM implementation and training:

- **Allow employees to play a role in selecting the CRM solution.** If they feel as though they played a role in the selection process, they will be more willing to accept the new technology.
- **Offer one-on-one training.** Generally, one-on-one training is more effective than group training, which can oftentimes be less relevant to individual employees. Within each training session, focus on the features that the employee will actually be useful to them. There's no need to spend time teaching a sales representative all of the details of features

## CRM Marketing & MAP

With marketing automation, CRM can become an even more powerful tool. Some CRM programs offer built-in marketing automation features. Another option is to utilize a MAP (Marketing Automation Platform) integrated with your CRM.

Here's how it works in a nutshell. The MAP stores all customer leads, including anyone who has ever visited your booth at a trade show or signed up to your e-mail list. But those leads will not automatically be

designed to record customer service interactions. Whenever possible, use more CRM savvy employees to provide training. Allow each employee plenty of time to ask questions. In individual training sessions, they will be more likely to do so.

- **Put all of your leads in the CRM.** Sales representatives will learn how to use CRM quickly if they need to use it in order to access leads and contact information. Also, start to use CRM to automatically distribute leads. When CRM consistently provides sales representatives with leads, any resistance is likely to melt away.
- **Monitor CRM usage.** Most CRM programs have features that automatically inform managers when a sales representative isn't following up on a lead automatically assigned through CRM. If an employee is consistently failing to follow up on automatically assigned leads, it's time to talk with them privately.
- **Develop a standard system for contact records.** Every contact profile should look the same (absent identifying information). If you need important data from a spreadsheet or another database this may

transferred into your CRM until they reach a certain level of engagement with your company and become a “warm” lead. The warmth of a lead is measured objectively through a scoring system that your sales and marketing teams create together. Once a lead becomes a MQL (Marketing-Qualified Lead), it can be automatically assigned to a sales representative.

Integrating MAP and CRM can bolster both the sales and marketing departments when done correctly.

be a little difficult, but it's worth the effort to ensure that your records are organized and uniform.

- **Track important information only.** Because CRM can store such a wide array of data, it may be tempting to start recording everything. But the more onerous you make the process of recording customer information, the less likely it is that your employees will use CRM.

Establish standard operating procedures for recording customer information that are reasonable. If information isn't helpful in terms of making a sale or strategic decision-making, leave it out.

- **Use a tagging system.** Tags help you to track critical information about your customers with minimal effort. Establish a standardized tagging system to track relevant, helpful information.

**If information isn't helpful in terms of making a sale or strategic decision-making, leave it out.**

- **Use CRM to track sales and calculate commissions.** CRM is greatly advantageous to sales representatives because it can automatically generate sales reports, which saves them the tedium of having to create reports manually.

From a managerial standpoint, it is also convenient to link CRM to accounting software for purposes of calculating commissions. If sales representatives know

that deals that aren't documented on CRM won't be counted, the incentive to use CRM is obvious.

- **Create a standardized system for recording customer service interactions.** It's quite likely that at some point multiple employees will be involved in the same customer service case. By developing a standardized recording system, it will be easy for everyone to understand what's going on, even if the other person isn't at the office at the same time.
- **Assign social media responsibilities.** Social media success comes from a concerted, ongoing effort, not occasional bursts of activity whenever you have the time. To ensure a consistent presence, assign employees to specific platforms or duties.

The benefits of CRM and a strong social media presence for small businesses are obvious. To take advantage of these benefits, start the process of selecting and implementing a CRM solution ASAP. Soon enough, you'll be wondering how you ever did without these powerful tools that enable you to better connect with your customers.

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