neon NOISE PODCAST

Episode 5: Why You Need to Use a CRM

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0:00:01.9 Ken Franzen: Hey, everyone, this is Ken from Neon Goldfish. I think most of you'll agree that the relationship you have with your customers is one of the most important components of your business. You work so hard to attract their attention, to get them to become your customer, and you work with them to keep them satisfied, and hopefully become a promoter of your business. So what do you use to keep track of all this? How do you keep everyone in your organization updated on the conversations, the emails, the meetings, and all the other interactions you've had with your customers?

0:00:31.9 Ken Franzen: In this episode of the Neon Noise podcast, Justin and I explore customer relationship management software, more commonly known as a CRM. We hope our conversation gives you a solid understanding of CRMs, the reason you should use one, features to consider when looking for a good CRM, and some actionable steps you can take to get started today. Enjoy.

[music]

0:01:00.1 Justin Johnson: Hello, everybody. Welcome to this episode of the Neon Noise podcast with Justin and Ken. Today we are going to talk about CRMs and reasons that you should use the CRM. Ken, the customer is the focal point of any business. Without the customer, there is really no business.

0:01:18.2 Ken Franzen: That is absolutely correct, Justin.

0:01:20.7 Justin Johnson: As businesses, we spend so much time marketing to prospective and existing customers, we spend time communicating to them about why they should purchase our products, our services, and then we spend time trying to keep them satisfied with all their purchases. Where exactly does the CRM fit into this, and why's it so important?

0:01:43.8 Ken Franzen: A CRM makes the entire process of managing relationships with the customers a lot easier. It's gonna provide that systematic approach that anyone in your organization can access. So they can key in and find exactly what's going on with any particular individual, or in the case of a CRM, we're gonna call them contacts, at any point in time of that relationship. So let me give you a couple of examples of how this could apply. We'll start off with a large company, maybe someone in the manufacturing industry. We're talking about 100 plus employees. They're spread across multiple locations, they're in multiple departments, and because they're so larger and wide multiple facilities, their customers are likely gonna interact with different individuals within different departments. The sales department, they're gonna work tirelessly trying to close these new customers, or they're gonna try to upgrade the existing ones. When a project comes to light, perhaps they have to send it over to estimating to get the estimating department to assign a dollar figure...

0:02:56.7 Justin Johnson: Right.

0:02:56.7 Ken Franzen: For what it's gonna cost. So we look at then the estimating department now communicating with them, as well as the sales department.

0:03:06.4 Justin Johnson: You got quite a few people talking to each other here.

0:03:08.4 Ken Franzen: Absolutely. And so estimating might have questions. They reach directly out to the customer to get answered, and then how do sales know what the conversation was had unless they're sitting right next to estimating? And so the whole thing here is: How do you keep track of the conversations, the emails, the files, everything under the sun that goes on with that particular contact so that the next person in the organization that's responsible for communicating with this customer contact, they can easily take the baton and seamlessly begin their specific function in the overall process?

0:03:50.2 Justin Johnson: Sure.

0:03:51.4 Ken Franzen: Now let's look at a smaller company. Maybe it's an owner, an admin person at the office, a sales rep, maybe like an operations manager or project manager. I'm thinking in my brain, a lawn care company pops into my mind. And so here we have a smaller group. They're all likely in the same location, they likely have fewer customers, and maybe the owner and everyone there has excellent memories and can just spit out whatever happened with every interaction.

[laughter]

0:04:23.6 Ken Franzen: "Mrs Jones, I cut her grass. I accidentally lopped off her tulips...

[laughter]

0:04:28.4 Ken Franzen: And she yelled at me, and then she called...

0:04:31.0 Justin Johnson: You really like tulips.

0:04:31.8 Ken Franzen: The office, and then told Suzy at the office that she wants a refund, and then the owner. So for all this to go down, there's been a couple different interactions, and how could we possible keep Mrs Jones happy and know exactly what took place and everything? So having a centralized system that can help manage all these interactions, even if it's with a smaller group or organization... But even what about a one person business? Justin, remember back in the day when we were solo web shops?

0:05:10.0 Justin Johnson: Do I ever. Yes.

0:05:10.8 Ken Franzen: Absolutely. And so even though...

[laughter]

0:05:13.1 Ken Franzen: We were the only... I know I speak for me, and I'm thinking I'm speaking for you, we're the only person interacting with all these clients. I still needed a way that I could record my meetings and keep track of the proposals. Did I send 'em out a proposal? What are my upcoming tasks? My memory was a heck of a lot better back then than it is now ten years later. So I needed to have something that was going to help me keep track of everything that was essential. I'm a little bit OCD, so I didn't want anything falling through the cracks and forgetting about something.

0:05:50.0 Justin Johnson: Yeah. I think it's important to know that we're not implying that all businesses out there are not operating without a system to keep track of this. It's just that there are so many keeping track using systems that are not as efficient as they could be.

0:06:06.6 Ken Franzen: Yeah, that's spot on. I always like to, when I go in a meeting, ask the clients how they're managing those customer relationships. It's really the reason why we're called, and we're usually called in to talk about websites and marketing, and when I bring this up, they are always like look at me crooked.

[laughter]

0:06:30.1 Justin Johnson: What do you mean, CRM? What is that?

0:06:31.6 Ken Franzen: "Where's the reason behind this?" So some of the responses that we get is Excel. Excel's a very common one: "I use Excel to keep everything organized." QuickBooks. A lot of businesses use QuickBook, and "we have all contacts inside QuickBooks." Or they do have a CRM. Maybe it's something that was homegrown, built in-house, or they are using Salesforce which is one popular software as a service or SAS platform out there. Those are examples of responses that we get, but none of 'em, even the Salesforce option I find, aren't being leveraged as much they could. Obviously the QuickBooks and Excel response are systems that could be improved upon. But there's ways to go all about this. Also you could choose a horse and buggy for your daily commute rather than driving the car that you do. So sometimes there's vehicles available that'll help us get to that same destination faster and more efficient, and overall, an easier process.

0:07:43.2 Justin Johnson: Yeah. Completely agree. Why don't we take a second to give those that might not be familiar with CRMs just a little bit of a foundation.

0:07:53.6 Ken Franzen: That's a great idea. All right, so, CRM is the acronym for customer relationship management. Basically, it is a system for managing everything that you do with your customers, and this includes everything from basic things like their name, their phone number, email address, Twitter handle, favorite color, birthdays to all the interactions that you have with them. Your meetings, your phone calls, email interactions, even the files that you have associated with that contact like your contract, your proposals, basically everything all the way down to the purchase history for a customer.

0:08:47.4 Justin Johnson: Basically what it boils down to is CRMs come in all shapes and sizes. Some are internal computer programs that were built as internal systems tied to corporate databases. Others are SAS, software to the service platforms operating in the ever popular cloud, while specific functionality, it's going to vary widely from one to another. Basically, they all share one common goal of storing customer data for future use and access.

0:09:24.6 Ken Franzen: Sure.

0:09:26.0 Justin Johnson: So basically what we wanna do today is drive home these three points. Reasons you need a CRM, basically how to choose a CRM, and what to do next once you have.

0:09:38.7 Ken Franzen: Perfect, and so let's get started with the reasons you need a CRM. First that I wanna talk about is collecting customer data. Your customer database is if not the most, one of the most important assets to your business. We've touched on the name, the phone number, the email address. Every morsel of info about your customer that we can store in house somehow. And so how you actually store that information is equally important. A stack of business cards or manila folders in a filing cabinet.

[chuckle]

0:10:15.1 Justin Johnson: You don't use that anymore?

0:10:16.2 Ken Franzen: Not the most convenient way to store that information, nor access it when you have a question about a customer that they call you on the phone, and your responses is, "Hold on one second. Let me go to filing cabinet and pull your file." That's gonna take a long time to be able to respond and get up to date with what we're talking about. Or if they stop in for a visit. So a CRM is gonna provide all their information, everything about them in a very easy to search format. So you can quickly, easily, locate update customer data at a breeze.

0:10:53.9 Justin Johnson: Right. Next up will be to follow a defined sales process. Do you even have a defined sales process? Basically, I'm not gonna go into all the details of why you should have a defined sales process. You should. Using a CRM, it's just going to help you outline your sales process, it's gonna help you provide your salespeople with an easy-to-follow format. Now sales is going to have a distinct set of steps to follow and report on syncing everybody's efforts, and providing management with the insight where each sales opportunity stands basically throughout that sales process.

0:11:33.4 Ken Franzen: Absolutely, and that's an important component with the CRM is giving management a good snapshot of where things are. That's something that's a big attraction point for them. Next: Better service your current customers. Excellent customer service is an attribute that a lot of businesses talk about. I think it's almost clichÃ©, "We have the best customer service."

0:12:00.8 Ken Franzen: One of the best ways to provide excellent customer service is treating them like they're someone you care about. Someone you value, someone that's very important to your business. So the smaller details, like their kids names or the fact that they like the fish, or if they have an aunt from the same hometown as you. That's next to impossible to remember all that just using your human memory, storing these details that you pick up during conversations with them in a system like a CRM that's easy to access, so when they call, you pull up their account and you can say, "Hey, look, their kid's name is Jimmy, and Jimmy likes to fish with Aunt Suzie, who's from the same hometown as me, that's spectacular," but you have all that at your fingertips when they call.

0:12:55.4 Justin Johnson: Yeah. That's very important, as well as recognizing your best customers. We all want more of those best customers, basically, they appreciate everything that you do for them. They see the value in what you're doing. They see the value in your service, and they continue to come back for more. So, basically, how do we get more of them and less of those PITA customers, the good God, the pain in the asses, right?

0:13:28.0 Ken Franzen: Yup.

0:13:28.2 Justin Johnson: How do we get more good customers?

0:13:29.6 Ken Franzen: Exactly.

0:13:33.4 Justin Johnson: When you log every interaction of a customer in your CRM, you can quickly begin to dissect qualities of behaviors of those best customers. You can go back and look and say, "Okay. I'm gonna back track and see, what did I do to attract those people, and just learn more about what these particular customers like and cater to their needs." Right?

0:14:00.4 Ken Franzen: Sure, and that would be next to impossible without all this data in such an easy to use format, right?

0:14:07.3 Justin Johnson: Right. Get rid of the PITAs man.

0:14:10.6 Ken Franzen: We would love to do that [0:14:12.4] ____. That's part of the process, identifying who the PITAs are as well.

0:14:18.8 Justin Johnson: Right.

0:14:19.2 Ken Franzen: So, it's all about getting there. Flipping over rocks and moving forward. What about increasing sales productivity? Sales people...

0:14:28.8 Justin Johnson: That's not a bad thing.

0:14:30.2 Ken Franzen: Exactly. I'm talking about the productivity of sales people. So, sales people, they love to sell. They do an excellent job at selling. They're great communicators, they're effective, people like them. They rarely like to do paperwork. They rarely like to log activity. They do not like to sit in staff meetings or anything else that does not directly lead them to selling or earning commissions. They're very driven by that.

0:14:57.1 Justin Johnson: There you go.

0:14:57.6 Ken Franzen: So, using the CRM is gonna help streamline these mundane tasks, so that they can spend less time on the undesirable activities that accompany the selling activities. And so, one would argue, are you recommending that they use a system that they aren't currently using or something. Yeah, you're gonna take steps and you're gonna be exercising different muscles here, there's no doubt in that, but in the long run, the use of and the integration of using a CRM in daily activities will lead to more productive selling time for the sales people, no doubt.

0:15:39.8 Justin Johnson: Yeah. Absolutely. So next, I think, like automation, you know, automating, just basically your nurturing campaigns. Marketing automation, something, it's a popular buzz term. A lot of people are talking about it now, and just marketing automation and lead nurturing, it's just quickly growing due to all the advances that we see in technology right now. Properly segmented CRM, working in conjunction with some type of marketing automation software, it takes all that very, very manual process of just continuously filing up and what not, and it automates everything. This allows sales to more points of contacts, which we all know that we want, if we can contact more people on a daily basis, with actual contacts than they ever have before. So, basically, we can do all this without picking up the phone, sending an email, or driving to a customer site, and then add in specific things, like lead [0:16:46.1] ____, and now basically you're equipping your sales team with the ability to concentrate only on the qualified leads, and you're not chasing, or possibly pissing off or scaring the leads that aren't ready to buy from you today.

0:17:06.6 Ken Franzen: Absolutely. How handy would that be for a sales person to just to know based on response activity and interactions.

0:17:14.1 Justin Johnson: Yeah. This person is a qualified buyer.

0:17:16.9 Ken Franzen: And they've been active and engaged in your website. They've been opening your emails. They've been... Any sales person would say, "I need that, I want that. That would allow me to be more effective in... Rather than, I have to call, I've a thousand people on my list, I've no idea who or what or where."

0:17:36.1 Justin Johnson: Well, just think about that. If you are working a list like that, say you've got 300 people. 300 to 500 people that you're sending out to on a regular people, and you've got a way to go in, and look and see that, "Okay 15% of my list, they've opened these four messages that I've sent them 10 times, and the other 90% of my list, they're just not active. What are you gonna concentrate on from a sales point, from a sales perspective? I'm gonna go back, and I'm gonna hit up that 10% of my list. That's my priority. That's my focus now, just to be able to automate that process, it's a great tool to be able to have.

0:18:18.2 Ken Franzen: Absolutely. I can't argue with you on that whatsoever. So the last item I think we should talk about is one of the more important ones, too. It's the dreaded sales turnover, and CRM had really helped with this because...

0:18:34.1 Justin Johnson: Those people...

0:18:34.9 Ken Franzen: It's a position that most companies where they have higher turnovers, the norm, you hire salespeople, you find an excellent one, and you try to hold on to them. Sometimes that's a challenge to do. The flipside to that is trying to hire a new salesperson that can do the things you helped them to do.

0:18:58.9 Ken Franzen: So if you think about the impact though that the other party, a sales person whether it's someone that you want to get rid of or someone that you'd like to retain that as leaving you. Think about the impact that has on your business.

0:19:14.6 Justin Johnson: Big impact. I mean, when you...

0:19:17.0 Ken Franzen: It's huge, absolutely. So for starters, they were the point of contact with your customers, not you. They were out there. They're representing your company. They likely built rapport. They had lunch, coffee, whatever you might think with your customers. And so when they leave, if your first step is having to go through their inbox, and their filing cabinet, and the messages that they might have sent via text on the company phone and everything to try to piece together what that relationship was like, and if it's in good standing or not. When was the last time they contacted. That's gonna be a challenge.

0:19:56.6 Justin Johnson: Yeah, absolutely.

0:19:57.9 Ken Franzen: You're also gonna need to quickly notify all your customers that they're no longer with your business. And while you likely had something in place like a non-disclosure agreement, you always run that risk that salesperson may try to contact your clients. It depends when they go to competitor or let's say they leave to try to compete with you. And while we all love to think that...

0:20:21.7 Justin Johnson: Salespeople do that?

0:20:22.3 Ken Franzen: They have. I know.

0:20:23.1 Justin Johnson: Come on. They don't do that, do they? [laughter]

0:20:25.8 Ken Franzen: They do... They do. Well, occasionally. And so that why you wanna have that non-disclosure agreement be something that hopefully safeguards you from that. There's no guarantee that they're gonna follow that or adhere to it. So being able to quickly get in front of your customers ASAP is vital. And if your customer database is a stack of business cards that sits in their cubicle, that's gonna make that challenge difficult.

0:20:55.6 Ken Franzen: The process of hiring a replacement, it has to be quick and efficient. So the absence of the salesperson means that others have to be pick up where they left off, and especially if your hiring process is more thorough than most. And these tasks are gonna lead to extra stresses because your other salespeople are going to need... Or if that was your only salesperson, you then need to be the one that can communicate, and keep the conversations and such going with your customers. So finding another salesperson to fill the void needs to be done quickly. But, it's also helpful if you have other conversations logged and documented, so that others can pick up where they left off.

0:21:41.9 Justin Johnson: Sure. Which brings up a good point is once you find the right replacement, they got to be trained, and brought them up to speed on basically all their accounts. I mean, onboarding any new employee, the longer that it takes to bring them up to speed, the more your sales productivity dips. And typically, what is it like 10 months or so that they say that it takes a new sales rep to be fully productive. Something along those lines.

0:22:12.3 Ken Franzen: Yeah. That obviously varies depending on the industry that you're in, and the ability of the salesperson themselves, but that's definitely a statistic that's out there.

0:22:24.7 Justin Johnson: Yeah. It's just your new salesperson, they need to be able to connect with all of your current customers and prospects that you have in your sales phone. At the end, the customer is obviously what is the most important. And just the fact that you had to replace a member of your team. It's not their issue. They don't care about it. They don't wanna hear about it. The new salesperson, they just should not have to reconnect with zero company history. And you should have something to provide them, so they can be able to step right into that role, and take over from the person that left.

0:23:05.9 Ken Franzen: Absolutely. Nothing's more frustrating when... And I see this with some of the different media companies that would sometimes work with them. And most of them are awesome. Most of them are great like, "Hey, I'm your new rep, I'm dealing with you." "And I see that you've done X, Y, Z and A, B, C with Molly that you used to work with... That's great. The one frustrating phone call you get is, "I'm so and so. I'm your new rep. Tell me... "

0:23:32.7 Justin Johnson: Tell me a little bit about you.

0:23:33.8 Ken Franzen: Tell me about your company.

0:23:34.6 Justin Johnson: Did you... Could you guys go through your company history for me?

0:23:36.9 Ken Franzen: That is just so frustrating because we don't have time for that. No one has time for that.

0:23:44.0 Justin Johnson: Nobody does.

0:23:47.0 Ken Franzen: So the next major point that we want to help you with in this conversation is... Alright, now that we talked about reasons that you need a CRM, how do we go about finding a good CRM?

0:24:00.0 Justin Johnson: How do we go about finding a good CRM. I think first things first let's determine what exactly are your goals? Just ask ourselves, what are you current pains? What type of challenges do you hope that, you know, by plugging the CRM is gonna help you overcome? And then just step back, and maybe work with your sales team and learn about their bottle necks; learn... What are the problems right now? And you know they... Your sales staff, they're going to have without question more interaction with a CRM than probably everyone else. So what boils down to it is to be sure that the solution that you choose is it going to apply to their goals as well.

0:25:02.4 Ken Franzen: Absolutely.

0:25:04.1 Justin Johnson: All right. So hey, next is let's see what is involved with setting up an implementation. You know, some CRMs set up... They are as simple as creating login and uploading an excel file of all your contacts. We've got other CRMs that are more sophisticated: They're going to require contacting probably assistance of a third party. Possibly to integrated your systems... Just really, really, really be sure to, you know, fully understand the time and resources that will be involved in, you know, taking your CRM out of the box and putting it all together for everybody to use.

0:25:44.3 Ken Franzen: Sure. And I think that you're going to find more that you encounter gonna be the login and upload contacts format.

0:25:51.0 Justin Johnson: Probably the majority.

0:25:52.5 Ken Franzen: Yeah. But if you add and you want more bells and whistles sophistication, you are looking at them and there's nothing wrong with them. It's just contract it was through finding out and ask the vendor that you're working with so that the software vendor if they have contacts...

0:26:06.9 Justin Johnson: Do they have any?

0:26:08.0 Ken Franzen: Yeah, if they have contacts in your area that...

0:26:09.1 Justin Johnson: Sure.

0:26:10.1 Ken Franzen: They recommend because there are different partners that work with these different software companies that can help you. Say, "Alright great, on ecommerce website that I need to integrate with seamlessly so that that they can talk to one another." So that's key there. And that's the next point. See if the CRM does integrate with the platforms they use. A lot of these do. A lot of them have it right out of the box with the SaaS platforms, where are we we work with HubSpot and HubSpot will also work with SurveyMonkey. Those are two platforms that know about each other, they've met, they went on a date and they decided to partner right? So...

0:26:50.7 Justin Johnson: Let's work...

0:26:51.7 Ken Franzen: Its actually...

0:26:51.9 Justin Johnson: We're going to continue on.

0:26:53.1 Ken Franzen: Continue on. They got a couple of clicks where they can then talk to one another. So, some of those may not have cooperative integrations already set in place. But, they likely have an API and that API can be used to communicate with different platforms. So, it'll help save on... Knowing all these things are gonna save a ton of time on the setup. And the more integrations that you can put in play, the more of your systems that can talk to one another makes everything so much easier to use. It's going to increase productivity, its going to increased the likelihood that everyone's is going to use this. And that will make everything... Your own entire process much better.

0:27:32.6 Justin Johnson: Speaking of easy to use, ease of use is huge you know, see if they have a mobile app that works in conjunction with the CRM. I might be tempted to go with that really sexy interface. Or the one that has more buttons than, you know, than Michigan.

0:27:49.6 Ken Franzen: Cool.

0:27:51.0 Justin Johnson: But you know in the end, just make sure that what you choose is easy to use. A difficult CRM is nothing more than a CRM that is not going to get used. You know most CRM platforms, they're going to allow you to demo the software before you're fully commit to it. Most of those demos are anything from a 7 to 14 day trial period. Allows you to get in, you know get your feet wet, and just you know get in and try everything else and see if it's right for you.

0:28:24.5 Ken Franzen: Absolutely. So when you're demoing that software, even before you demo, you should consider some of the specific features and see how well these CRM align with the goals that you discussed. The first part about getting your team together, just talking about what matters most. So there's a couple of different features... I mean some of these have thousands of features... But these are the main ones that I think you should consider prior to exploring and demoing software. The first is gonna be contact management. Be sure that you can record all the data points that you want for an individual contact. Most CRMs are going to have customer fields that you can add to. So for the instance of what their birthday is or their favorite color or do they have it and that lives in your hometown, you can set up specific field that will help manage that contact information.

0:29:25.8 Justin Johnson: The next step would be sales... Sales pipelines. Sales pipelines it basically it's gonna allow you to know all your potential sales, your potential opportunities and tie that to a specific contact along with the likelihood of what that projected date... The date of the sale will be. You know, when that's going to be final; this is data that's often followed by management as a barometer for business development.

0:29:55.1 Ken Franzen: Absolutely. Another item to look at is task management...

0:30:00.3 Ken Franzen: Many of us, especially if you're like me, we live and die by our task or to-do lists, and so quick and easy assignment of these tasks for a particular contact is super common in a CRM. I know that some people say, "I've got Outlook for that," and that's fine. What we want to do here is we wanna take a look at the different functionalities, from different systems to streamline all these together. So while I'm not telling you to stop using Outlook for your tasks, you may wanna consider something as common as Task Management, migrating that over to a singular system. It depends on the options you go with and things on those lines, but Task Management is huge.

0:30:48.0 Justin Johnson: Very important. Next would be a solid content library. The documents that used during the sales process is probably fairly standard. A content library... It just can make use an upkeep of all these documents much easer, much nice to have them all in one place, and know that, "Okay, I can just go to my content library whenever I need that logo, whenever I need that sales document, whenever I need that proposal template," stuff along those lines. And it's just going to ensure that all your salespeople are using the proper documents during their sales process. They're all following a specific process in order to locate that information in your content library.

0:31:36.9 Ken Franzen: Absolutely. The dashboard, I think, is huge. Dashboards are, typically when you log in the first screen you come to in most software platforms, but it's gonna be a convenient overview of everything going on within the CRM itself. You're gonna be just playing different metrics that can give you figured and those are oftentimes customizable by the individual user, so... Or Justin, you might say that it's important for me to see and understand the metric one, and two, and three, exactly, and what my pipeline looks like and what my tasks are for today. My particular dashboard, I might wanna arrange into a different fashion because I think that other things are more important. The ability for that dashboard to be customized, I think is more of a preference thing, but now that we use the CRM, that we can customize, I really like that. I think this is... You log in...

0:32:35.5 Justin Johnson: It's extremely helpful.

0:32:36.2 Ken Franzen: It feels like you're at home.

0:32:37.2 Justin Johnson: You're gonna have different items that are gonna be more important to you, different metrics that you're gonna wanna see initially than the next guy, than me. 100% agree with you. Very, very helpful. Next up would be making sure that it is mobile-friendly since a lot of sales does happen outside the office. Just having a mobile-friendly version of that CRM, it's becoming more of a need than a want. These sales reps are probably going to be pulling up their mobile device, or an iPad, or something along those lines, so just making sure that that CRM is mobile-friendly is very important.

0:33:27.1 Ken Franzen: Or that they even furthermore have an app. I know a lot of them out there now have apps, which are even better because in the event that you have to take notes in a place where you don't have an internet connection, you can then record those notes and they sync once you are connected, so that's helpful as well.

0:33:48.3 Justin Johnson: Yeah. Good point. Very good point.

0:33:50.0 Ken Franzen: The next feature I think is important to look at, is something we already touched on was integrations, but take a look at the different systems that you're using in your office. Figure out what CRMs integrate with these other software platforms. With these, without having to really go out of your way to hire a developer to make that happen, no. If it's a custom home-built widget that you have, that you're using then that might be the case. But a lot of these platforms that you probably are already using are set up for a lot of seamless integrations with many of these CRMs. Take a peek at that feature of integrations and make sure that you have a full understanding of what it will and won't work with.

0:34:39.2 Justin Johnson: Next would be ease of use. Some CRMs are very, very robust, offering every feature that one could think of but most of those are typically cumbersome, they're difficult to use. If the interface is not intuitive and super easy to use, it just is not going to get used, and the whole point of having the CRM... It's just completely gone out the window. You're not gonna use it if it's difficult. Many CRMs, they have features that are going to allow you to do a bcc e-mail from your favorite e-mail client. Some are gonna allow you to e-mail directly through the CRM. That's extremely helpful. Some provide the ability to place calls, to record calls directly in the CRM. We talked about this before, the more automation that the CRM has, it's cutting out the manual data entry that's required, and it's going to get used much, much, much, much more.

0:35:55.4 Ken Franzen: Absolutely. And at this point, you might be saying, "Alright, this is great, guys. So you gave me a whole list of reasons that we need a CRM, and things to look for when finding and features to consider. What do we do next?" There's a ridiculously long list of CRM options put together by a company called Capterra. They're paged on top CRM software. We're gonna include a link to this in our show notes, so be sure to check out our show notes and get that link and you'll be able to access and look through CRM options until you are sick in the stomach to look at CRM options, right?

[laughter]

0:36:45.6 Justin Johnson: Too many CRM options, I love it.

0:36:46.6 Ken Franzen: Too many.

0:36:48.4 Justin Johnson: But it's very, very helpful.

0:36:49.7 Ken Franzen: Sure.

0:36:50.5 Justin Johnson: So check it out. Alright, so what do we do next? Where do we start next? Alright, I'll do...

0:36:57.6 Ken Franzen: So let's look at some action steps. Things that we can do today and going forward. First, take a look at what you got going on right now. Evaluate your current customer relationship management practices. What is your current process? What are your major bottlenecks? Now that you got a little bit of foundation about what a CRM is, what areas do you feel a CRM could help improve?

0:37:22.9 Justin Johnson: Hold a meeting with your management in sales. We talked about this. Just try to figure out what challenges that you face. And make a prioritized list of requirements you would like to see from the CRM. Getting input from everyone using the CRM, it's going to be extremely important, basically just for getting buy-in to use on a daily basis.

0:37:48.2 Ken Franzen: And that's important, is getting everyone's buy-in. Because if you're listening to this thinking "I have to go to my owner, my company owner, my boss with this." Or you're a business owner saying "I have to take this to my team because we need to use this." You heard this or you've been researching this and now you think this is a great idea, but now you're gonna take it to a bunch of people and blindside them with "Hey, I got this new whole system that we're going to all do."

0:38:16.4 Justin Johnson: "It's gonna transform everything."

0:38:17.5 Ken Franzen: It's going to be helpful and it's definitely great to do, but to get them to buy-in is going to be huge because having them participate is gonna be the key in that process. The more participation, the better. And they're gonna be buying in just like when you try to get your kid to think that brushing their teeth is a great idea, and that they come up on their own suddenly brushing teeth is much easier than when you just tell them that they have to do it, right?

[laughter]

0:38:45.4 Justin Johnson: Right.

0:38:46.5 Ken Franzen: Alright, the next item we wanna do is begin researching the different CRM platforms that are out there and narrow down that list to those that have the functionality you're looking for. You take a look at that, Capterra 's top CRM softwares from our podcast page you'll find a giant list there. And you'll see there's thousands of options. So what do you do? Well, start with your top priorities and whittle away from there. You'll see a lot of popular names. You'll see some that you've never heard of, you might even find some CRMs that are specifically created for your niche, your industry. And those would be worth exploring too 'cause they may contain possible attributes that others don't because they are specific to your industry. So take a peek at those as well.

0:39:35.4 Justin Johnson: Alright so next up, I would say, let's demo the platforms. Find out which ones are easiest to use. These demos they usually are free, they're anything from seven to 14 days. That should allow you plenty of time to see if you're comfortable with that interface, if you like everything that it involves and includes. Be sure to get your team members, the team members that are gonna be using it to go through that demo process and get a collective amount of feedback from those folks.

0:40:15.5 Ken Franzen: Absolutely. Next you're gonna wanna research what's gonna be required for the initial setup and integrations of any software that you're going to use. Now, when you start that demo, you're likely going to trigger a series of emails and a phone call from a representative at that software company. And this is a great opportunity to ask them questions about this setup and integrations. Especially if their website's vague on what it'll cover. But basically what you want to understand is, the demo that you're in, will it seamlessly transition right into the live account, are there any features that you aren't seeing in the demo that you will in the paid for version? How easy is it going to be to export out the data from your existing, if it's a CRM or Excel, how easy and will they help you with that data transfer for populating your new system. And if not, not a big deal. Now if you're sitting there with a file cabinet or a stack of business cards, you're likely looking at some data entry, but that's okay. It has to be put into...

0:41:22.6 Justin Johnson: Gotta get it in there somehow.

0:41:24.0 Ken Franzen: Exactly. So that's what I really recommend doing as far as that research. And then now that you've done all this, it's time to pick your winner, right? So make your selection, be something that you're willing to and ready to commit to. And then what? Populate your CRM with your contacts and your info. Get started with getting that information in there.

0:41:50.4 Justin Johnson: Yeah, and lastly I would say establish some formal process so everyone using the CRM understands exactly what they need to do to use it, and what they need to be using it for.

0:42:05.6 Ken Franzen: Absolutely. No, I think some instruction would go a long way. An outline process is the key here, so that you can be sure that it's going to be used, everyone fully understands all the capabilities that the CRM processes, and that the data being entered and updated is all done consistently across the boards so that when someone runs over Mrs Jones's tulips that Suzy can...

[laughter]

0:42:33.7 Ken Franzen: Figure out what's going on.

0:42:35.8 Justin Johnson: I love it. Alright, we are out of here for today. Hopefully our conversation today will help you better understand how much the right CRM can benefit for those precious customer relationships you work so, so, so hard for. And be sure to check out the show notes at neongoldfish.com/podcast. This is Justin and Ken with Neon Noise, and we will see you next time.

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