CloudCall's guide to CRM systems and **integrations.**

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CRM systems & integrations: what's it all about?

CRM stands for Customer Relationship Management. The key is in the name, it's getting the most out of your relationship with customers – both on an individual level and as a means to understand the customers' overall experience. When used effectively, the CRM system has the power to transform customer satisfaction.

Customer experience is one of the cornerstones around which a successful business is built. It's importance stems from the fact that without impressing new and existing customers, they will likely take their business elsewhere. What's more, when customer experience is great, your customers will encourage others to use your business through word of mouth and positive reviews. All of this will ultimately affect your business's bottom line.

The term CRM system refers to a piece of software where customer contact information is stored and allows a business to manage interactions across multiple communication channels. CRM tools allow everyone in the business to have full access to all the information they need when interacting with customers. This could be salespeople speaking to prospects, customer service agents when dealing with customer inquiries or marketing teams setting up automated campaigns.

91% of companies with over 11 employees use a CRM system.[1]

Why is understanding Customer Relationship Management so important?

Due to the wide variety of CRM systems available, it's possible to find one which perfectly complements your unique business strategy. Some platforms have been designed as a one-size-fits-all solution for many industries, while others have been created to suit a specific industry. If you are investing in a CRM, it's worth taking some time to think about what functionality you need before speaking to any suppliers.

## Choosing the right CRM integrations for your business.

Along with the default functionality of the CRM system, many platforms support third-party integrations, add-ons and apps. These additions to the CRM can amplify the benefits the platform offers, provide more functionality, or simplify processes. This means a CRM system can be customized to suit a variety of business models, different industries or different functions within the organization. If this extra functionality and customization is important to you, choosing a platform that offers these integrations will help your business to stay competitive.

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What functionally does a **CRM system** provide?

Gather information about your customers
All information is stored in a single location which makes it easy to organize your work, collaborate with others and delight your customers.
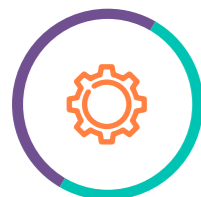
Automate marketing, sales or customer service processes
Free up time for employees by allowing them to work more effectively.

Data and analytics
Improve customers interactions and provide valuable business insights that can help with managing staff.

Managing workload
Create dashboards to keep track of activities, setup to-do lists with notifications and collaborate with team members.

Accurately predict your sales
Keep track of all your open deals and predict when they'll be pushed over the line, so you can forecast sales revenue.

Personalize the customer experience
Use information about your customers and details of your previous interactions to delight them with unique experience.

What functionality does a **CRM integration** provide?

Integrated calls and SMS
Computer Telephony Integration brings together all of your calls and texts and connects them to the CRM.

Billing and invoicing
Simplify billing, invoicing and other accounting processes by connecting them to your CRM.

Surveys and data collection
Integrate a survey platform with your CRM and all the results will be automatically saved in the right place.

Advanced analytics
If your CRM's analytics are not as powerful as you need, an integration will provide more detailed approach for a data driven businesses.

Email and calendar
Some integrations will synchronize your email and calendar with your CRM to help make the most out of the platforms.

Marketing automation
Integrating marketing automation with your CRM helps improve productivity, prioritize leads and cut costs.

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Does my business need a CRM system?

You'll struggle to find a business which doesn't view its customers as a vitally important asset. As businesses grow, managing the relationship with these customers can become increasingly complicated. With multiple team members across multiple departments, CRM systems allow everyone in the business to see all customer data. This can include their contact details, and any previous interactions they have had. This information can be used to ensure the customer doesn't have to repeat themselves, and the employee knows the full picture.

Our recent white paper Perfecting the art of conversation: how businesses are managing increased call volumes, has highlighted the importance of businesses having access to a single source of customer information.

How much does a CRM system cost?

CRMs can range in price, and the price can be calculated in different ways depending on the platform. Many CRMs charge per user, which could be a monthly subscription cost. It's usually easy to add or remove users depending on your business's growth. Some CRMs change based on the number of customer records you have stored in the system.

It's also common for CRMs to add charges for additional functionality. You should also look out for one-time fees for setup, installation and training. While costs can seem high, there is a lot of competition in the market which helps to keep prices low. There are even CRM providers which offer free versions of their software with limited functionality and storage size.

The average ROI for a CRM system is $8.71 for every dollar spent.[6]

Now that's impressive!

CRM applications can increase revenue by up to 41% per sales representative.[3]

What are the benefits of using a CRM system?

Keep track of your customers

Every interaction, whether it's a call, email or online inquiry is recorded and accessible to everyone. This allows all team members, throughout the customer's entire journey, to have access to all the information they need. In today's competitive marketplace, having this enriched data helps to make your customers feel valued and makes them feel like you understand their bespoke needs.

Collaboration across the business

Everyone in the business has the information to get their jobs done to the best of their ability, without having to constantly ask colleagues for help. This provides seamless interactions for remote teams and multi-national businesses, ultimately improving the quality and speed of service for customers.

Improve Efficiencies

Depending on your CRM, there are many features which are designed to save time throughout the day. These can be simple features like clicking on phone numbers to automatically dial them or setting up complex workflows which send a series of promotional emails to prospective customers.

Targeted Communications

Use customer and prospect engagements to ensure you are providing them with messaging that fits their industry or specific needs. Humans talk to humans and personalized messages cut through the noise.

80% of consumers find they have to explain things over again when they recontact companies.[2]

52% say a lack of integration into CRM systems is slowing them down on the phone.[2]

CRMs are known to improve customer retention by as much as **27%**[3]

Sales pipeline management

The CRM can easily be used to calculate sales forecasts, work out the total value of deals in the pipeline or calculate the number of deals closed within a specific time-frame. Sales teams can use this information to learn from the past and make improvements to their sales strategy.

50% of teams improved their productivity by using a mobile CRM system.[5]

Improved customer relationships

You can easily manage customer issues and complaints because all interactions to date are easy to access. This will ensure more customers walk away happy and impressed.

Using a CRM can increase productivity by **34%** and forecast accuracy by **42%**[4]

Improve management

With everything stored in the CRM, managers can easily setup KPIs and track if their employees are carrying out processes correctly. For salespeople this could be monitoring the sales process, ensuring leads are being followed up correctly and in a timely manner. In a customer service function, management can use a CRM to keep track of open tickets and customer feedback scores.

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Is it possible to get more out of your CRM system?

CRM systems offer an out-of-the-box solution which can cater for a number of different business needs. Sometimes, this might not be enough, so many CRMs offer third party apps or integrations which enhance their solution. There are a host of integrations and add-ons which can provide email services, more detailed reporting, customer feedback surveys, advanced automation... the list goes on. In fact, some CRMs have such a well-developed ecosystem of add-ons that you'd struggle to not find what you are looking for.

Getting the most out of a CRM system doesn't just mean technology. We're talking CRM culture. You may not have heard of CRM culture, so let's break it down; we know that Culture can be thought of as behaviors and values that are shared among a group of people. When applied in the context of the CRM system, it simply means having the full team on board and using the CRM system to its full potential.

CRM systems have the power to improve management efficiencies, produce higher performing customer service and increased profits. But if staff aren't using it to its full potential, it becomes little more than a glorified address book.

What should companies do if they want to make the most of their CRM? The answer is to look at the culture of the organization and see if it's promoting the use of the CRM or hindering it. Creating a CRM culture within an organization ensures everyone wants to use the CRM as much as possible because they understand the value it can bring to their role, their teammates and the business as a whole.

Benefits of integrating telephony with your CRM.

Better customer experience

Store all customer data, including call records and notes in one place and keep your customers happy knowing they won't have to repeat themselves.

Smarter conversations

On screen notifications bring up the CRM record of the contact who is calling helping you have better conversations.

Improve employee performance

Set KPIs for call activity such as total number of calls or average call duration and track everything using the CRM.

Improve training

Call recordings saved in the CRM can be used for training sessions to identify best practices or find out areas that need improvement.

65% of companies using a mobile CRM are achieving their sales quotas. While only **22%** of reps using non mobile CRM have reached the same targets.[6]

CRM system adoption rates across industries are still fairly low at only **26%**[4]

68% find it hard to gauge the effectiveness of outbound contact.[2]

With revenues expected to reach over **$80 billion** by 2025, it's no surprise that CRM is the fastest growing software market.[7]

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In summary.

A CRM system is one of the most important pieces of business technology you can use. Any organization which interacts with customers on a regular basis can massively benefit from the power of a modern CRM system. It's a great place to store data, but as we've covered in this article, it's capable of so much more.

The core functionality of the system offers benefits that support most business functions including sales processes, marketing automation, customer service and operations. These functions can gather information on your customers, help manage workloads, personalize the customer experience and increase customer satisfaction.

There are countless benefits of using a CRM tool, but perhaps the most important are the improvements to efficiency, increased collaboration and the ability to keep track of customers. Get the most out of a CRM platform by encouraging a positive CRM culture across the whole organization.

Using a CRM system as a single platform to store customer interactions is a great way to reduce mix-ups. Duplicating information across systems or adding details to the wrong database can mean a loss of valuable customer conversations, making it difficult to resolve customer complaints and help with customer inquiries.

A CRM platform is a great way of keeping track of customer account details, account history and for managing interactions with existing and potential customers. Tracking these interactions can help you understand your customers through their buying habits, queries, requests and even their complaints.

The importance of customer experience is crucial to the growth and development of your brand. A great customer experience can build loyalty, that through word of mouth and positive reviews will lead to more customers, meaning more profit for your business.

A CRM integration can top off the existing functionality provided by the platform with tools to suit specific business needs. The ability to customize a CRM platform means they can be more versatile and flexible, therefore benefiting most businesses, no matter the size or industry.

CloudCall makes business communications quicker and more powerful. Our leading cloud-based phone system fully integrates with CRM systems to make your life easier. Combining features like click to dial, call recording, SMS and screen pop ups together with the power of your CRM.

You can view our extensive list of features if you want to learn more. Contact a member of our team to discover how CloudCall can grow your business with a seamless integration into your CRM.

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CloudCall is a communications platform that provides intelligence for your business. We enable and capture calls, chats and collaboration to provide a single view of multi-channel customer interactions. This turns conversations to insights that help your business grow in a complex world.