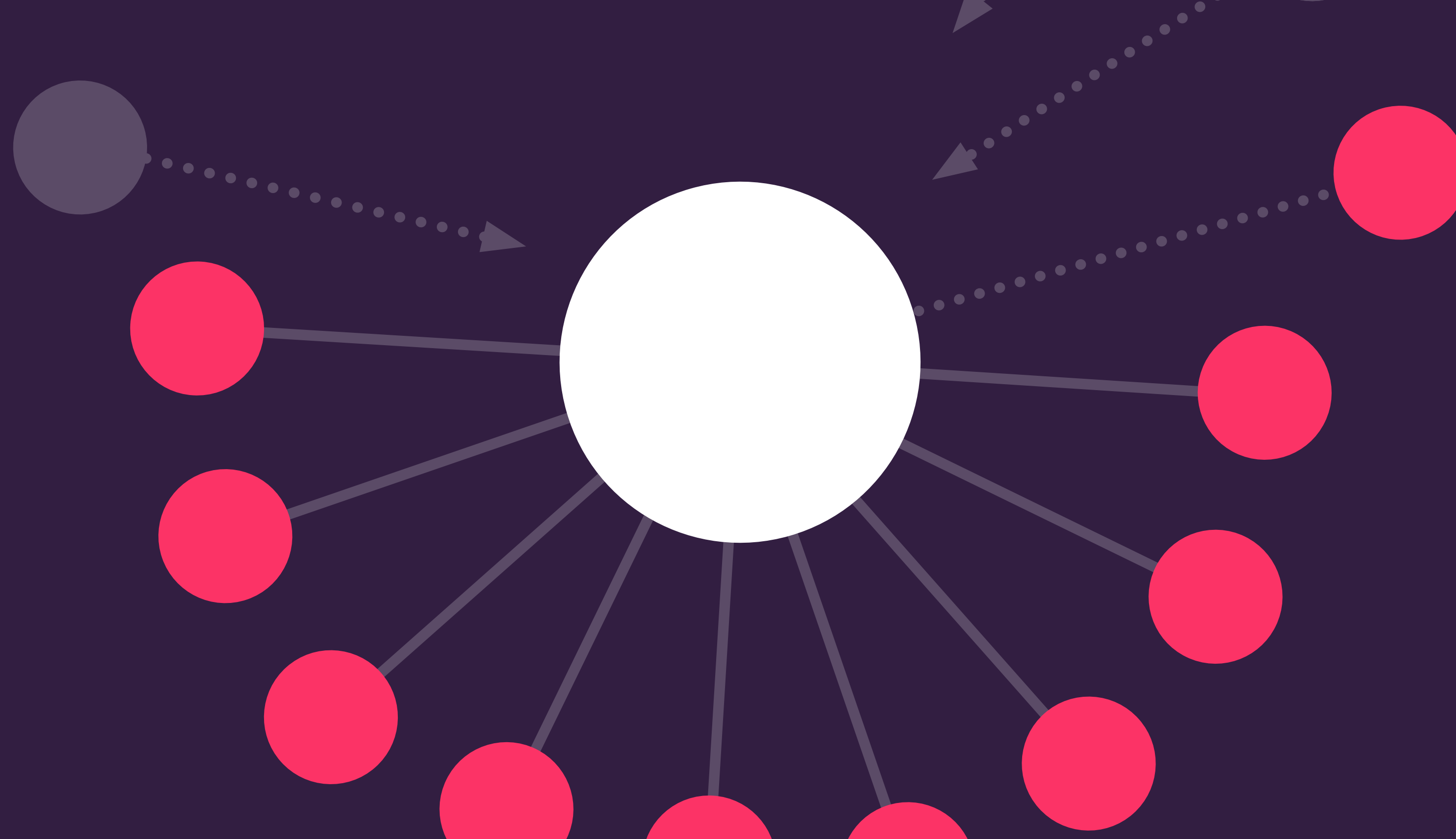
:copper

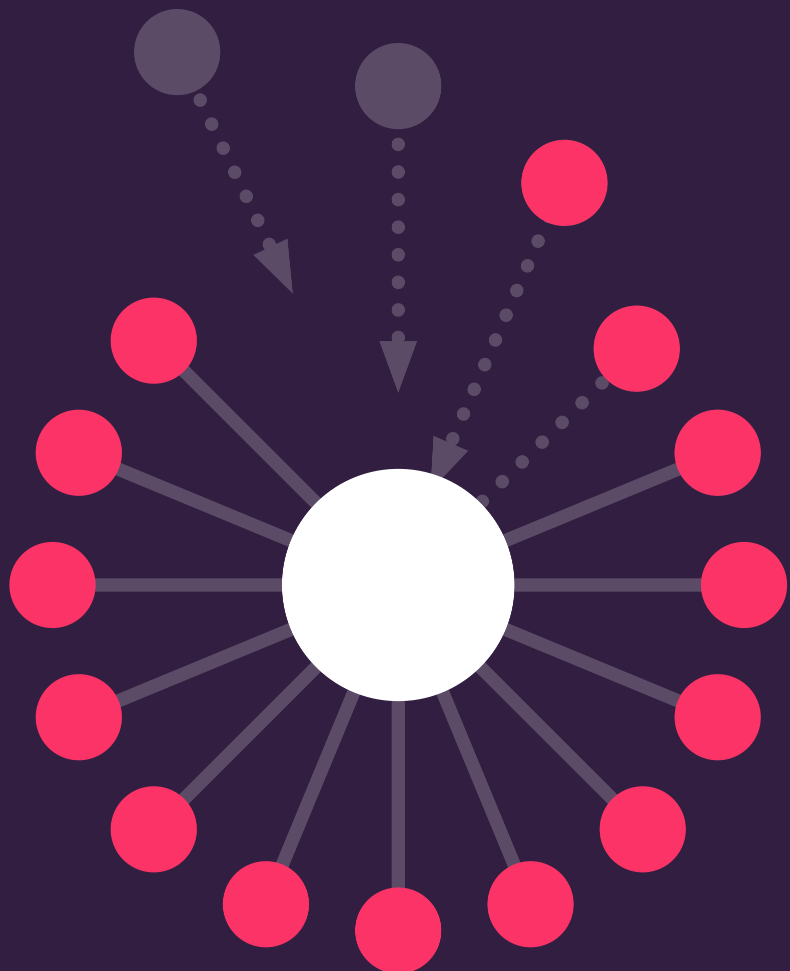
The Definitive Guide to Maximizing CRM ROI

What You Didn't Know You Could Do with Your CRM



CHAPTER 1

Survey Says... We're Not Using CRM to Its Full Potential



On a scale of 1 to 10, how important are your customers to your business?

For the majority of companies, the answer would probably be at least 12.

Because let's face it: if you don't have customers, you won't have much of a business.

For the modern business, a customer relationship management (CRM) software is essential to keeping track of each customer's details—and keeping them happy.

Conducted in partnership with Qualtrics Research, Copper's CRM Benchmark Report surveyed over 2,500 business professionals around the world.

+70%

OVER 70% OF RESPONDENTS SAID THEY USE THEIR CRM FOR CONTACT MANAGEMENT—YET SIGNIFICANTLY FEWER REPORTED USING THEIR CRM FOR OTHER TASKS.

31%

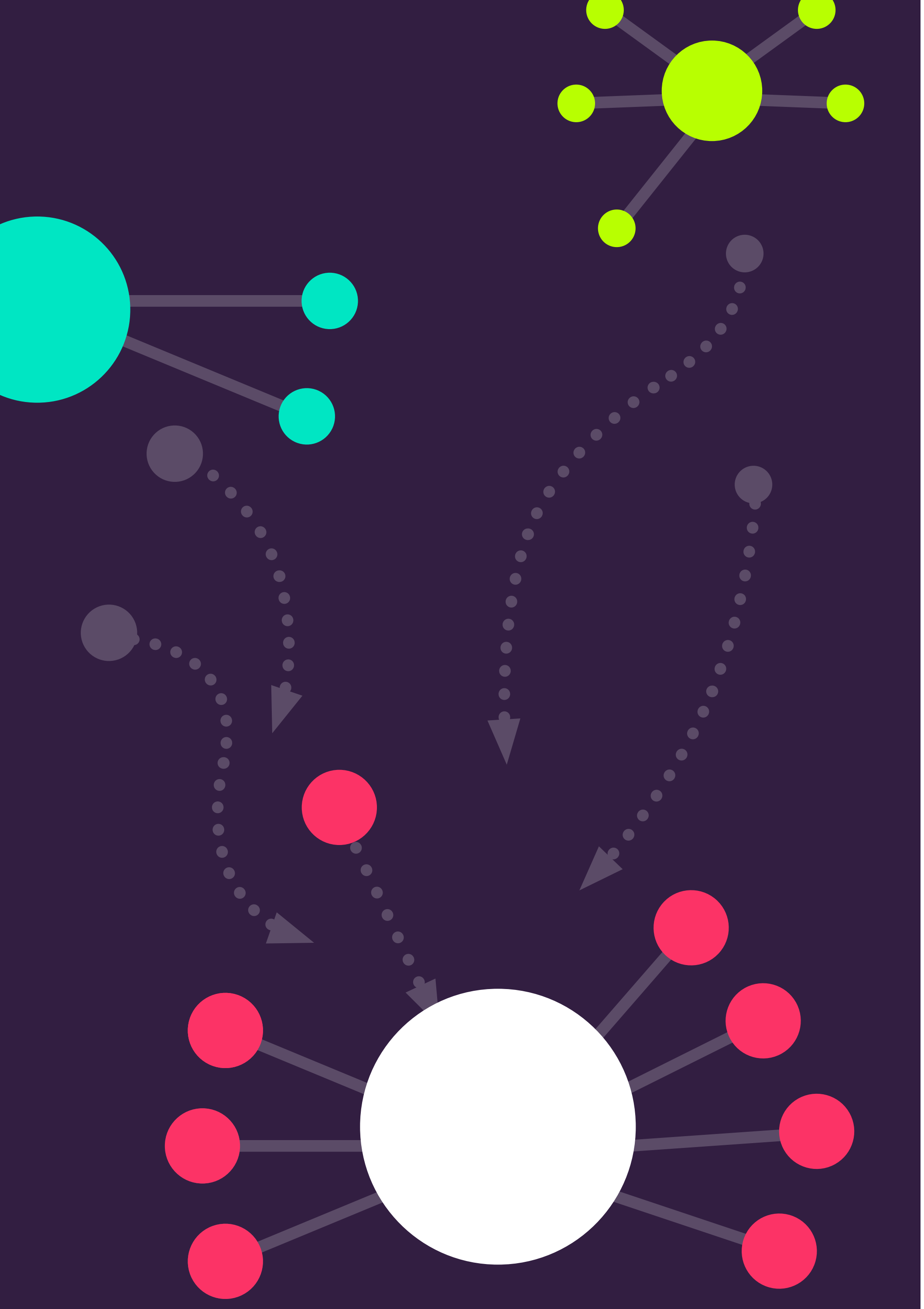
ONLY 31% OF PEOPLE SAID THEY USE THEIR CRM FOR PROJECT MANAGEMENT FORECASTING

15%

A MERE 15% SAID THEY USE THEIR CRM FOR TEAM SELLING

Today, contact management is just the tip of the iceberg when it comes to CRM software. In fact, there are many undiscovered features within your CRM that you may have never used before—and many time-saving, teamwork-improving, and productivity-boosting possibilities that you may not even know exist.

What this means: By expanding your knowledge of your CRM's capabilities, you could make your team more efficient—and cut down on how much you spend every month on other tools.

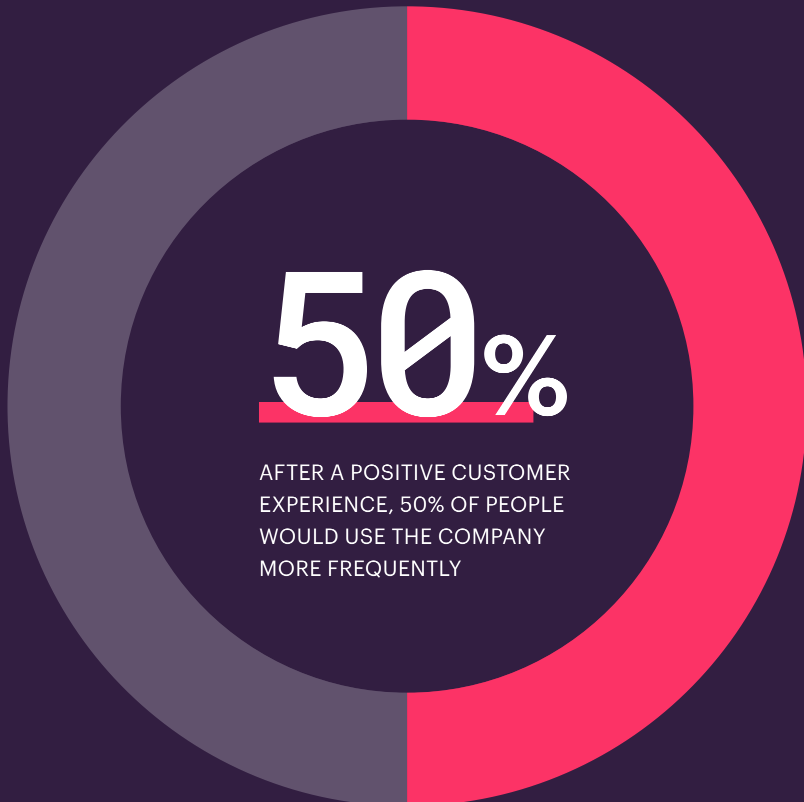


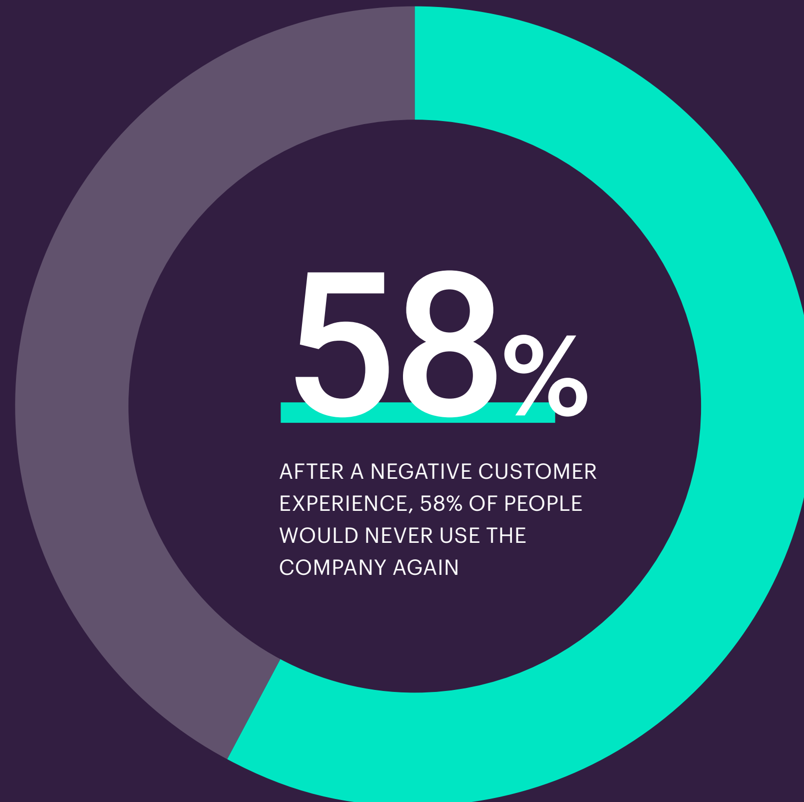
What makes your customers happier with you than with your competition?

In other words, what makes you stand out from your competitors?

Every business must have a special something that makes customers choose them over others that offer the same products or services. In most cases, that special something is a good customer experience.

Take a moment to mull over these numbers:





You've got nothing to lose by offering a good customer experience.

In the end, how you treat your customers and the impression that you leave them has a huge impact on whether or not they will come back to you in the future.

Using your CRM to its full potential gives you the ability to offer your prospects and customers an experience that stands out from the competition.

Think of this ebook as an introduction to the untapped potential of your CRM.

DISCOVER

Useful features that you didn't know your CRM had.

How to make your whole team a part of the selling process with a CRM.

How your CRM can help each person on your team save over 15 hours per week of work.

Why integrations are the best thing since sliced bread.

You'll save time and money by consolidating your tech stack.

Your customers will be happier with you than they would be with any of your competitors.

And, ultimately, you'll unlock the full potential of your team—and business.

CHAPTER 2

6 Things You Didn't Know You Could Do with Your CRM

Get ready: you're about to open the door to Narnia.

That is, if Narnia were a place where all your customers were happy, your team worked together seamlessly, and everybody knew exactly what they were supposed to be doing to make that next big sale.

1

Set and track team goals.

Your sales team has one common goal: make more sales. Now imagine that they have nothing more concrete than this mandate to guide them in actually accomplishing this goal.

While your company may have a monthly or yearly revenue goal, how does each individual member of your sales team factor into achieving that?

With a CRM system in place, each person on the team can clearly see their role in helping the company reach its goals.

For example, you can choose to view reports that show the total goal for the sales team and how each individual on the team has contributed. Alternatively, you can also see the total sales amount and the goal attainment percentage (which is the percentage of your goal that has been reached).

These kinds of reports help cultivate team spirit between the members of your sales team, as well as generate a bit of healthy competition. Having clear goals can motivate team members to do their best to attain them, as they're able to see their personal contributions to the success of the team.

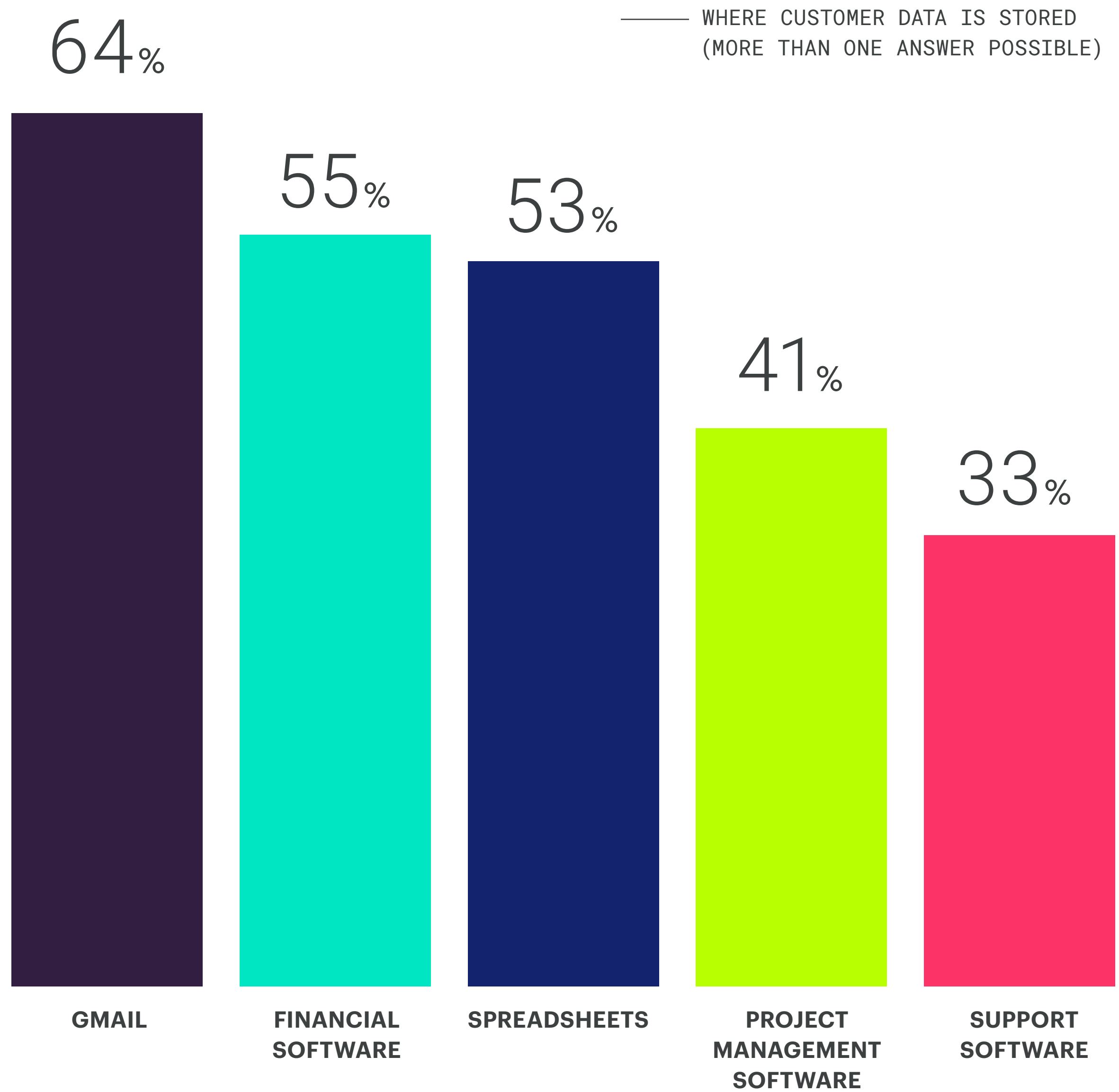
2

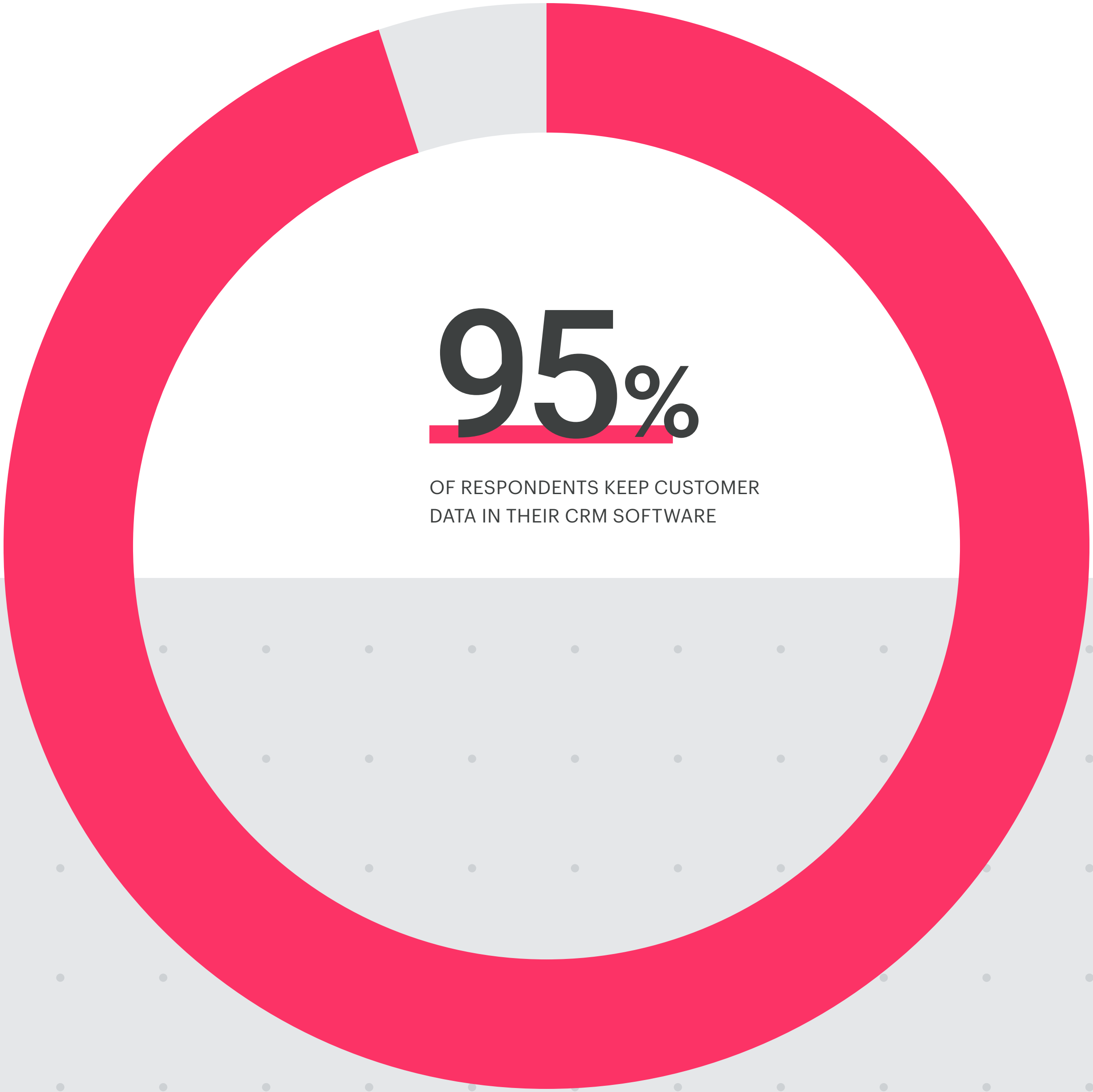
Integrate with the tools you already use.

The CRM Benchmark Report also found that 95% of respondents keep customer data in their CRM software.

However, many stated that their customer data also lives in other places.

How many hours are wasted every week, simply because teams have to search through email chains, update spreadsheets, and toggle between five or six different tools?





Your CRM has one purpose: to help you nurture customer relationships. However, to manage those relationships efficiently, your CRM must be consistently fed information from all tools where you store customer data.

That's where integrations come in.

Let's say your customer sends you information in an email. A good CRM should integrate with Gmail, automatically saving important details and contact information.

This keeps your customer data organized and minimizes human error (since the process is automated)—and saves you time and energy.

Your CRM should be able to integrate with the tools that your business uses every day, allowing you to see all customer information in one place. Here are the most-used types of CRM integrations:

Email and calendar

Integrations with Gmail, Google Calendar, or Outlook keep information where you can find it instead of in a long email chain. Bonus if there's a meeting scheduler that lets your contacts book meetings directly in your calendar without emailing back and forth about availability.

Project management

Asana, Trello, and Smartsheet are tools that many teams use to keep the team on track. Integrating this with your CRM helps sales teams see project status and projects alongside customer data.

Marketing tools

When your CRM integrates with tools like Mailchimp, you can keep track of marketing campaigns and their impact on sales and customer relationships.

Customer support and phone communication

Tools like Zendesk, JustCall, and RingDesk are integral parts of your communication with customers. Integrating your CRM with these tools ensures that all communication is logged and easily accessible for everyone.

Spreadsheets and documents

Customer data and other information often get saved in Google Docs, Google Sheets, or Dropbox. Integrating these tools automatically saves those files into your CRM without you having to upload and download documents.

Financial tools

Dealing with the financial side of sales? Integrate your CRM with tools like Xero and QuickBooks to easily pull up payment information. One way to automate your sales process: when you close a new deal in your CRM, it can automatically notify your accounting software to generate an invoice.

Proposal and contracts

Submitting proposals and signing contracts or waivers often require tools like DocuSign or PandaDoc. Integrations with these tools allow you to see when proposals are read and what documents need to be signed.

Team chat

Modern teams use messaging apps like Slack, Google Hangouts, and Intercom to communicate with each other and their customers. Instead of losing important information in a chat feed, integrate these with your CRM to store important information—and easily find it again. You can also get alerts on activity about Leads and Opportunities through these channels.

Sales engagement

When you're using tools like Outreach, Reply.io, or PersistIQ to engage with customers and leads, it's important that these interactions are logged in your CRM. Maximize your sales outreach by integrating these tools with your CRM, thus managing all relationships and points of contact from the same place.

3

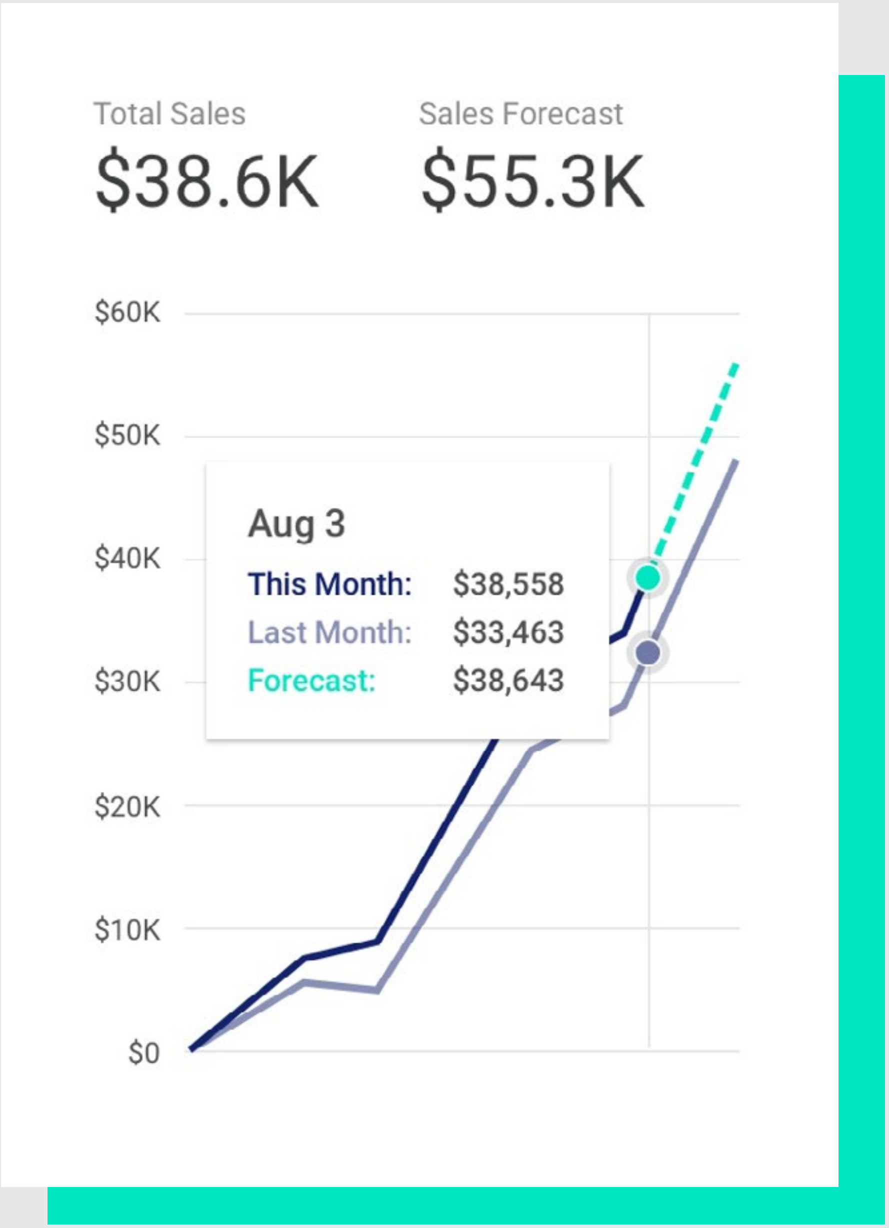
See sales forecasts.

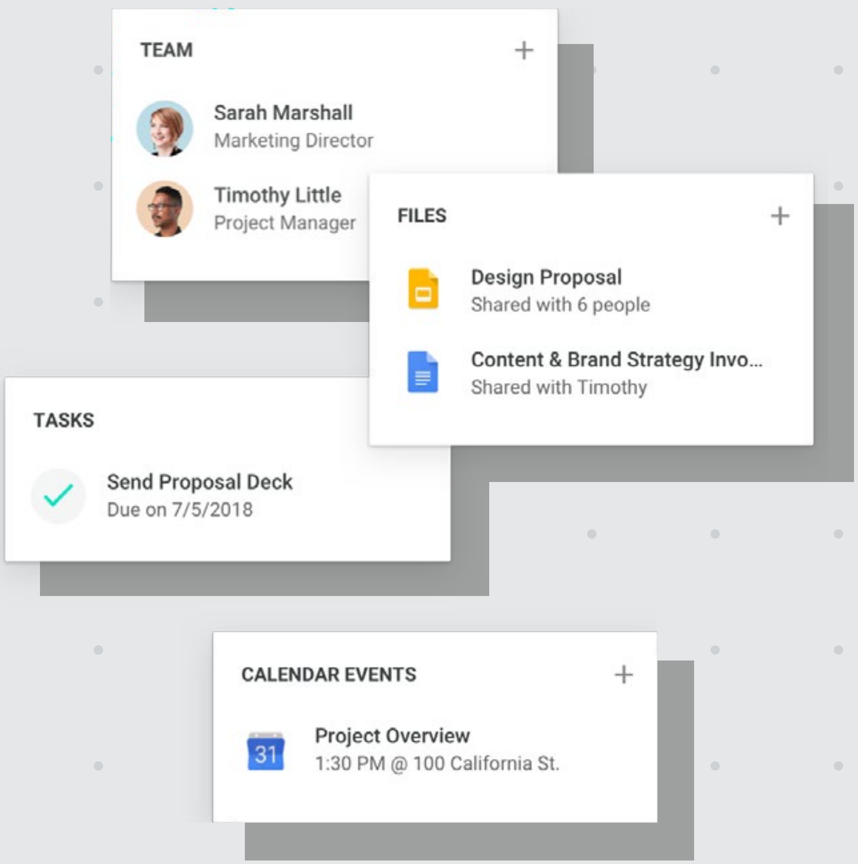
While sales forecasting would be much easier if we could take a peek at next week's results, a CRM can make this tedious task a reality.

Your CRM should be able to take data such as current deal status, previous sales, and more in order to produce reliable sales forecasts.

In fact, companies using CRMs can see as much as a 40% increase in sales forecast accuracy.

This is crucial, since improvement in sales forecast accuracy has been linked to increased revenue. In a study by the Aberdeen Group, companies that improved the accuracy of their sales forecasts were able to increase revenue by 13.4% year over year.





4

Manage tasks.

Instead of using separate task management tools for work related to managing your relationships, why not save money and time with a CRM? One secret to effective task management: setting automated recurring tasks, which makes sure that repetitive tasks don't get accidentally dropped during busy days.

Your workflows and project pipelines are as unique as your sock drawer. That's why a good CRM allows you to manage what you have to do, your way.

When everyone on the team has the ability to see where each contact opportunity is in your process, each person can play their part seamlessly (and keep the ball rolling with clear next steps).

Managers can assign tasks to different team members, give them deadlines, and attach any necessary information or documents. Your CRM should also allow everyone to see how their actions affect a customer's journey through the pipeline.

5

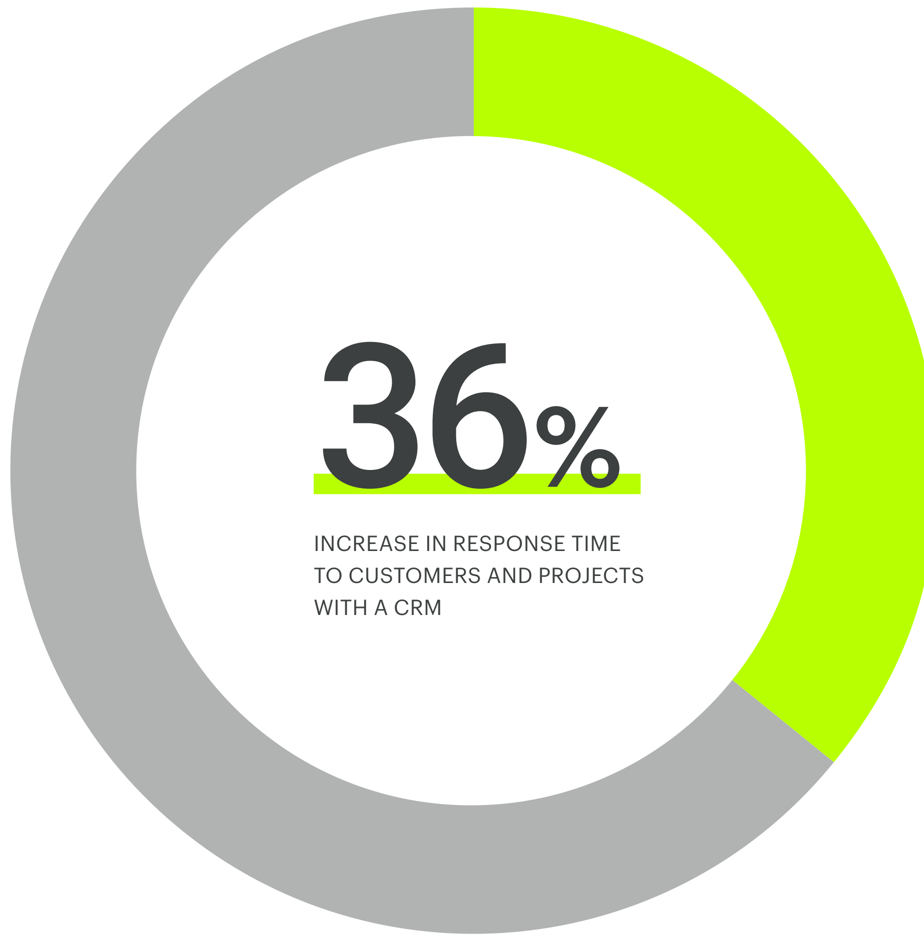
Start team selling.

Each member of your sales team has a different role, and each contributes in their own unique way to making that sale.

But, does everyone know what their specific role is? And if they do, do they have easy access to customer information in order to make interactions more efficient?

Using a CRM to sell together is one of the best ways to expand your team's potential—most systems should have activity feeds that everyone can access and communication options that are linked to specific records and opportunities (such as @mentioning teammates).

In fact, team collaboration with a CRM can lead to a 36% increase in response time to customers and projects, leading to greater customer happiness and ultimately more opportunities to upsell and cross-sell.



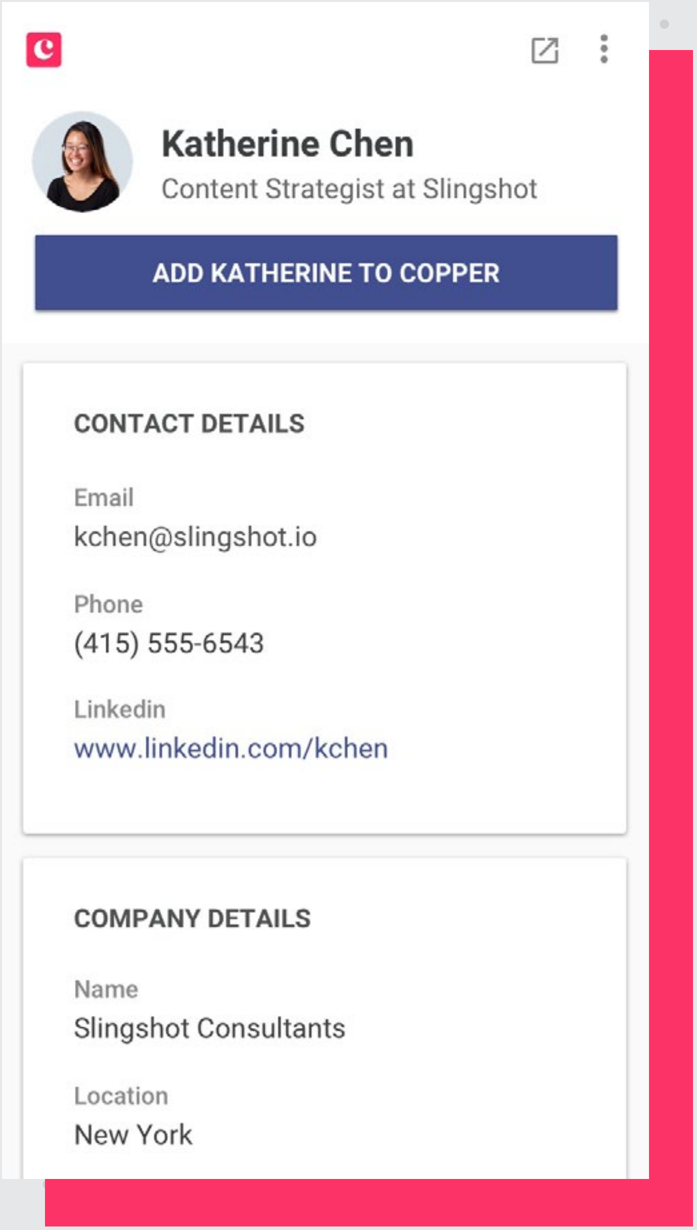
6

Take your work on the go.

According to IBM, 65% of companies using a mobile CRM are either meeting or beating their sales quotas.

It's no secret that mobile apps have infiltrated the workplace and made it easier to take your work on the go.

Modern CRMs haven't missed this trend. From making customer information available in an app on your phone to allowing you to log voice notes hands-free between meetings, CRMs' mobile apps are making teams more productive even when they're on the road.



CHAPTER 3

The Importance of Your CRM in Team Selling

To work effectively as a team, each teammate must be able to see previous interactions with customers at a glance.

In the CRM Benchmark Report, a significant number of respondents stated that five or more teammates are involved in each customer relationship.

That means at least five people are talking to the same leads and customers, bringing them through the pipeline and trying to win these sales.

The effectiveness of team selling then depends largely on whether or not customer data and interactions are visible to all team members. If not, efficient collaboration becomes more difficult because not everyone has full context.

HOW MANY TEAMMATES ARE INVOLVED IN BUILDING AND MANAGING CUSTOMER RELATIONSHIPS?

SMALL BUSINESS

0 teammates	1.4
1-2 teammates	24.3
3-4 teammates	40.8
5-6 teammates	17.9
7-10 teammates	7.6
11+ teammates	8.0
TOTAL	**1116**

MEDIUM-SIZED

0 teammates	0.5
1-2 teammates	13.4
3-4 teammates	32.0
5-6 teammates	26.9
7-10 teammates	13.2
11+ teammates	13.9
TOTAL	**1021**

ENTERPRISE

0 teammates	0.8
1-2 teammates	11.5
3-4 teammates	21.4
5-6 teammates	24.4
7-10 teammates	17.3
11+ teammates	24.7
TOTAL	**365**

This is one of the most underrated benefits of a CRM: when the system can manage each piece of customer data and meticulously record interactions for you, it makes it possible for the whole team to focus on working together toward the common goal of making the sale.

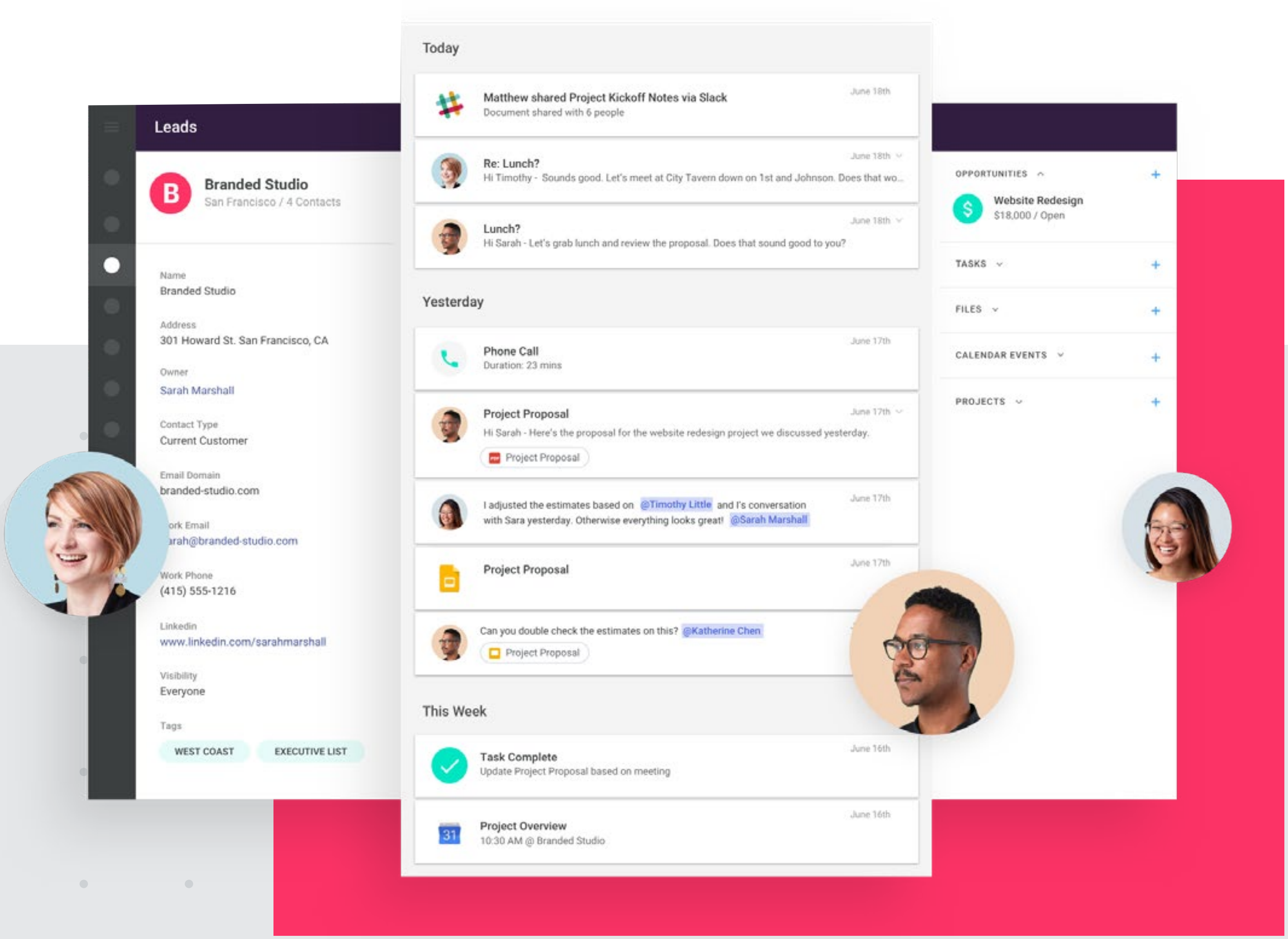
This is especially true when multiple teams are involved in the sales funnel.

WHICH TEAMS DO YOU COLLABORATE WITH TO MOVE YOUR CUSTOMER RELATIONSHIPS FORWARD? (MORE THAN ONE ANSWER POSSIBLE)

	SMALL BUSINESS	MEDIUM-SIZED	ENTERPRISE
Sales	74.3	61.0	52.6
Marketing	63.4	55.2	52.6
Business development	54.1	51.8	50.7
Operations	46.5	45.2	45.5
Customer success	35.3	42.7	42.5
Engineering/Product	25.0	30.3	31.8
Finance	20.1	27.3	32.3
HR	10.2	21.4	24.4
Legal	8.3	13.6	19.2
Other	3.5	1.9	1.1
None	2.3	2.5	1.9
TOTAL	**1116**	**1021**	**365**

For companies with a range of relationship-making teams (from Sales to Customer Success to Marketing and even Finance), it's even more important to ensure that all interactions are recorded and accessible to the teams involved in customer relationships. By automating data capture in your CRM, information remains consistent—which minimizes confusion in interactions with customers, even across teams.

Conversation is also key to team selling. That's why CRMs encourage easy interaction between team members—for example, by allowing you to tag team members in comments. That gives each member the ability to ask questions, receive feedback, and get the right documents, all with efficiency in mind.



CHAPTER 4

6 Ways to Use a CRM as a Productivity Tool

If you've ever tracked the amount of time that each team member spends on data entry, writing repetitive emails to answer common questions, and searching through email chains to find important information, you're painfully aware of this fact: every sales team needs more time.

That's why you'll be happy to know that a CRM is, in fact, a productivity tool in disguise.

1

Automatically capture data.

According to the CRM Benchmark Report, 42% of respondents said they spend from six to 20+ hours per week entering data into their CRM.

Instead of manually entering each piece of information about a customer, let your CRM do the work for you.

For example, some CRMs can automatically scrape data from the internet about your contacts and populate important account details. They can also integrate with tools you already use (like Slack, G Suite, Quickbooks, or Zendesk) by pulling data from these tools to populate account details—without you having to lift a finger.

42%

OF RESPONDENTS SAID THEY SPEND FROM SIX TO 20+ HOURS PER WEEK ENTERING DATA INTO THEIR CRM

PRO TIP:

Let's say you're part of a team with 10, and each of your team members spends at least six hours per week on data entry.

That means your CRM could be saving your team 60 hours of work per week!

2

Customize your own pipelines.

Did you know that visuals are processed 60,000 times faster by our brains than text?

That's part of the reason why having visual pipelines is essential to managing complicated sales processes. Having a visual pipeline allows you to see clearly where everything sits. This means you won't need to spend precious time deciphering data.

However, even within those pipelines, each company has a unique workflow. Customizing your CRM can streamline your workflow by allowing you to set up your pipelines in the exact way that your team works. Since the process is cut and dry, team members will spend less time on guesswork and more time working on the next sale.

3

Respond quickly with email templates.

Another valuable time-saving feature that some CRMs offer: pre-made email templates.

Sales teams spend hours each week writing repetitive emails to different customers. Whether it's answering common questions, writing individual onboarding emails, or other repetitive communications, it all adds up to a lot of extra time.

With your CRM, you can set up email templates that minimize these hours and give your team the ability to respond quickly and consistently to customers and leads.

Another email-related timesaver that CRMs offer is the bulk email feature. This is especially useful when it comes to opportunity pipelines.

For example, you could select all of your lost opportunities and send them a bulk email with a special promotion as opposed to following up one by one.

Or, you could send a bulk email to all of your open opportunities with a product update note.

With more sophisticated CRMs, you can add dynamic fields (like first names and company names), which give even bulk emails a personal touch.

4

Create custom reports.

Using filters and custom fields in your opportunities or customer pipelines allows you to create reports that are tailored to the information you need in that moment.

For example, by filtering by company size, you could generate a report on every company in your CRM that has more than 50 employees, showing you who you need to call over the next week.

This eliminates time spent sifting through data: with a couple of clicks, you'll have exactly what you need right in front of you.

5

Create automated workflows.

Reducing back-and-forths and meetings seems to become harder as teams become larger and more geographically spread out. This is where automated workflows can save hours and help everyone stay on track with their tasks.

For example, your CRM can automatically generate new tasks when leads reach a certain point in the pipeline.

Let’s say the status of an opportunity is in “first call.” You could create a workflow that automatically creates a task called “schedule second call,” assigns it to the team member in charge of that opportunity—and sets a due date that’s one or two days ahead.

This does double duty: giving you full control over your workflows and letting you focus on more valuable work instead of creating and assigning tasks to your teammates.

6

Get notifications when it counts.

Any self-respecting productivity tool has notifications to keep you up to date, and CRMs are no different. With the ability to set email and mobile notifications and alerts for important tasks in your sales pipeline, your CRM can ensure that everyone is aware of deadlines and that each lead is properly cared for.

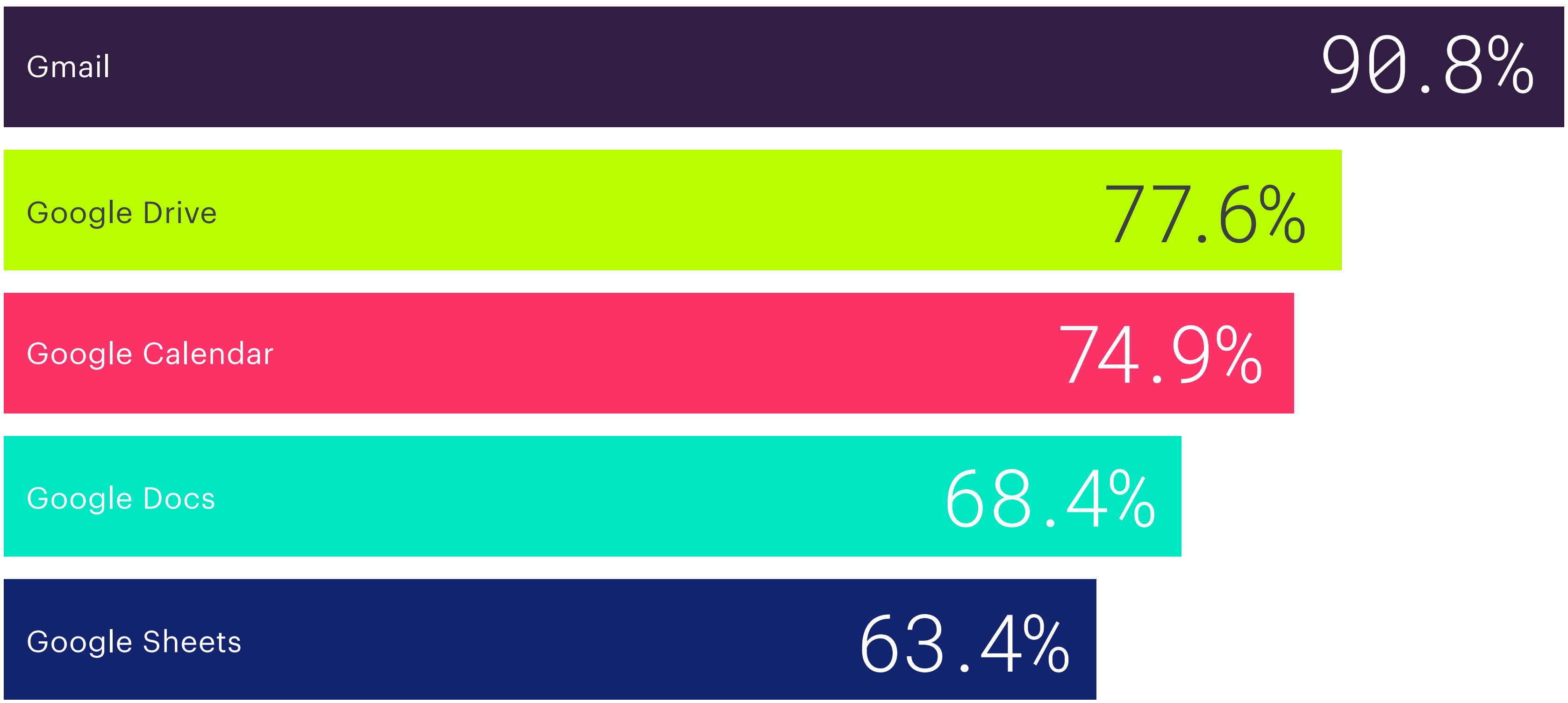
CHAPTER 5

How to Improve Team Efficiency by Getting the Most out of G Suite

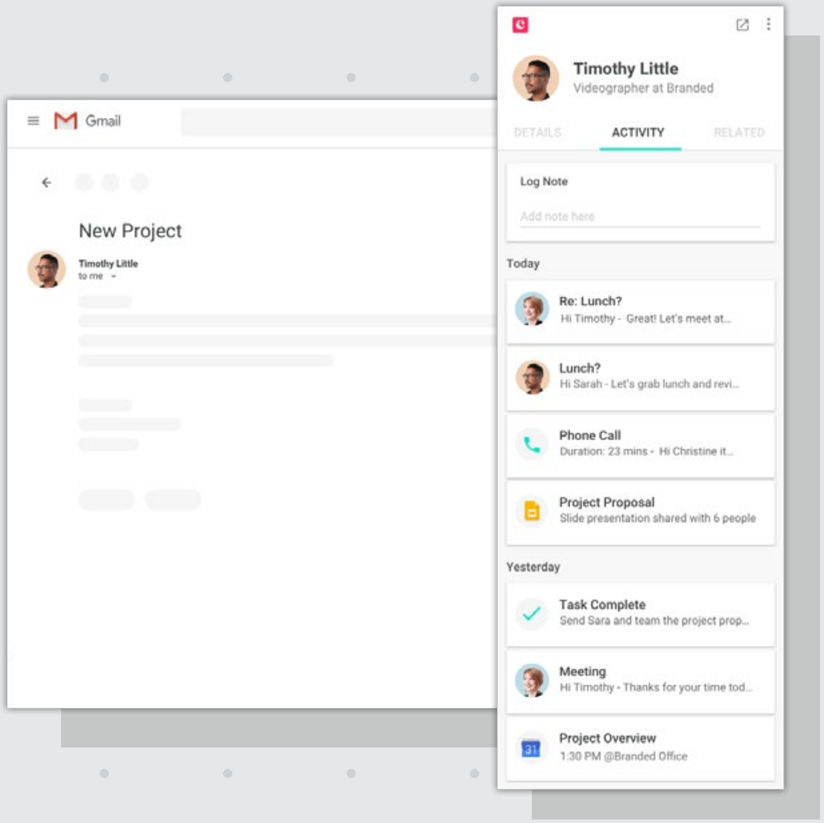
Gmail, Google Drive, Google Calendar—these are tools that most companies use daily.

In fact, 99% of the respondents surveyed in the CRM Benchmark Report reported using G Suite. And when asked how much time they spend using these tools, almost half of respondents said they spend more than 10 hours per week working in G Suite.

A SIGNIFICANT PERCENTAGE PRIMARILY USE FIVE G SUITE TOOLS:



Why is G Suite so popular? Because these tools help teams work more efficiently across the board. In fact, by collaborating in real time using G Suite, Celestica (a global enterprise) saves 17,000 hours of employee time yearly.



Gmail

Gmail is the headquarters of your conversations, where everything begins and ends. This is where interactions with customers start, where information is shared between teammates, and where leads are nurtured.

Integrating your CRM with Gmail opens up new possibilities for your entire team.

For example, while responding to an email from a customer, what if you could see all previous interactions?

When your CRM integrates with Gmail, you can quickly see the latest activity between your team and prospects—often without even leaving the email window. This helps you make sure you're not stepping on someone else's toes or asking questions that the customer has already answered.

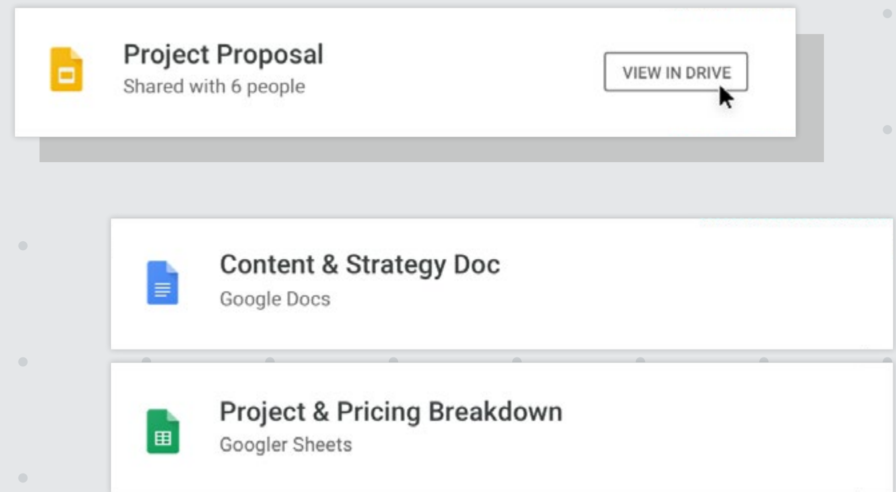
You can also see a list of related information for this account, such as offers on the table and those that have already turned into sales, as well as events in the calendar related to this customer, upcoming tasks, and important documents.

To get the most out of Gmail:

Today, organizing your inbox is easier than ever. Instead of digging through your inbox to find emails from different people about the same client, try creating a custom label for each client, which automatically saves all other related emails in the same place.

Google Drive

Sharing documentation and making files accessible and editable to everyone who needs them—even when they're out of the office—is essential to running an efficient sales team. When you use Google Drive to store every file, it's much harder to lose information.



To get the most out of Google Drive:

Any type of file, even non-Google-based files, can be housed on Drive. You can also create shareable links to these items, just like you would with a Google Doc or Sheet.

Want to save messages or attachments from Gmail directly into Google Drive? The free Chrome extension allows you to save and share important documents in seconds.

Google Calendar

A shared Google Calendar allows everyone to know what each other is doing during the week—and offers visibility for date-sensitive tasks.

This also gives the whole team a view of what's happening with different customers and leads and allows team managers to stay informed of each person's workload when planning projects and assigning tasks.

With everyone's time accounted for in the shared calendar, it's much easier out with a project—and which tasks are at risk of being overdue.

To get the most out of Google Calendar:

Google knows that you're busy. That's why you can add an event just by speaking to Google Assistant on your phone. It'll automatically be added to your team's calendar, where all team members can see it.

Google Calendar also helps you to be on-time to every meeting with travel alerts. Add locations to your events, and it'll send you a notification when it's time to leave.

Google Docs and Sheets

Both of these tools are used daily by sales teams, and allow teammates to save and edit different types of files. With a CRM integration, you can make sure that your data is consistent and accurate across different tools.

Whether you're creating proposals, sales presentations, or saving customer information, Sheets and Docs give your team the ability to collaborate in real time and work faster to produce the documents you need.

To get the most out of Docs and Sheets:

Communication is simple: add comments anywhere inside the file, and even tag individual teammates to get their feedback.

Also, version history allows you to go back and check on recent changes by anyone.

BONUS TIP:
Need to do a quick Google search while writing in Docs? The 'Research' tab allows you to search Google without even leaving the window.

These underused G Suite tools can also help your team's productivity:

Forms

Give your current customers and leads a platform for feedback by creating a Google Form. It's also an easy way to collect the information (which can be converted in a Google Sheet) needed to calculate your Net Promoter Score (NPS).

Hangouts

If your sales team needs training, you can regroup on Google Hangouts and get everyone into a room—figuratively. Reduce the costs of on-site training by organizing a virtual training session in Hangouts.

Slides

To create proposals and presentations with a bit of flare, Slides is the way to go. This tool allows for easy collaboration in real time, just like in Docs and Sheets. That means the whole team can work together on sales presentations without wasting any time.

CHAPTER 6

The Benefits of Using a CRM to Its Full Capacity

Save time. Lots of time.

As mentioned above, companies and teams are collectively spending a considerable amount of time every week on data entry.

With CRM systems' ability to automatically capture contact data, information from spreadsheets, and email interactions, teams can spend these hours on more valuable tasks (such as building customer relationships).

Collaborate efficiently and cut down on team frustration.

87%

OF CONSUMERS THINK THAT BRANDS SHOULD WORK HARDER TO PROVIDE A CONSISTENT CUSTOMER EXPERIENCE

Being able to customize your pipelines and manage multiple pipelines is key to making sure that all team members know your sales process.

This is important to team selling because it allows for consistency even when multiple people are involved with the same customer account. Consistency is key: according to a study by Zendesk, 87% of consumers think that brands should work harder to provide a consistent customer service experience.

Keep your team focused on its goals.

CRMs have the ability to present goal attainment information and reports that show where the team stands in achieving its sales goals. This gives each team member the power to see how they're personally contributing to reaching the sales quota.

This strong visualization of the end goal helps improve goal achievement. In fact, according to one study, people who can vividly describe or picture their goals are up to 1.4 times more likely to accomplish that goal than those who can't.

Wow customers by remembering the details they thought you'd forget.

Repeatedly asking questions your prospects and customers have already answered does not make a good impression. It could even make your company look disorganized—or worse, disinterested.

By using your CRM to record interactions with customers, you can quickly see what you've already talked about—last week, or even five years ago. With certain integrations, CRMs can even save important account details that were mentioned in emails, meaning you don't need to scroll through different email chains to find the right information.

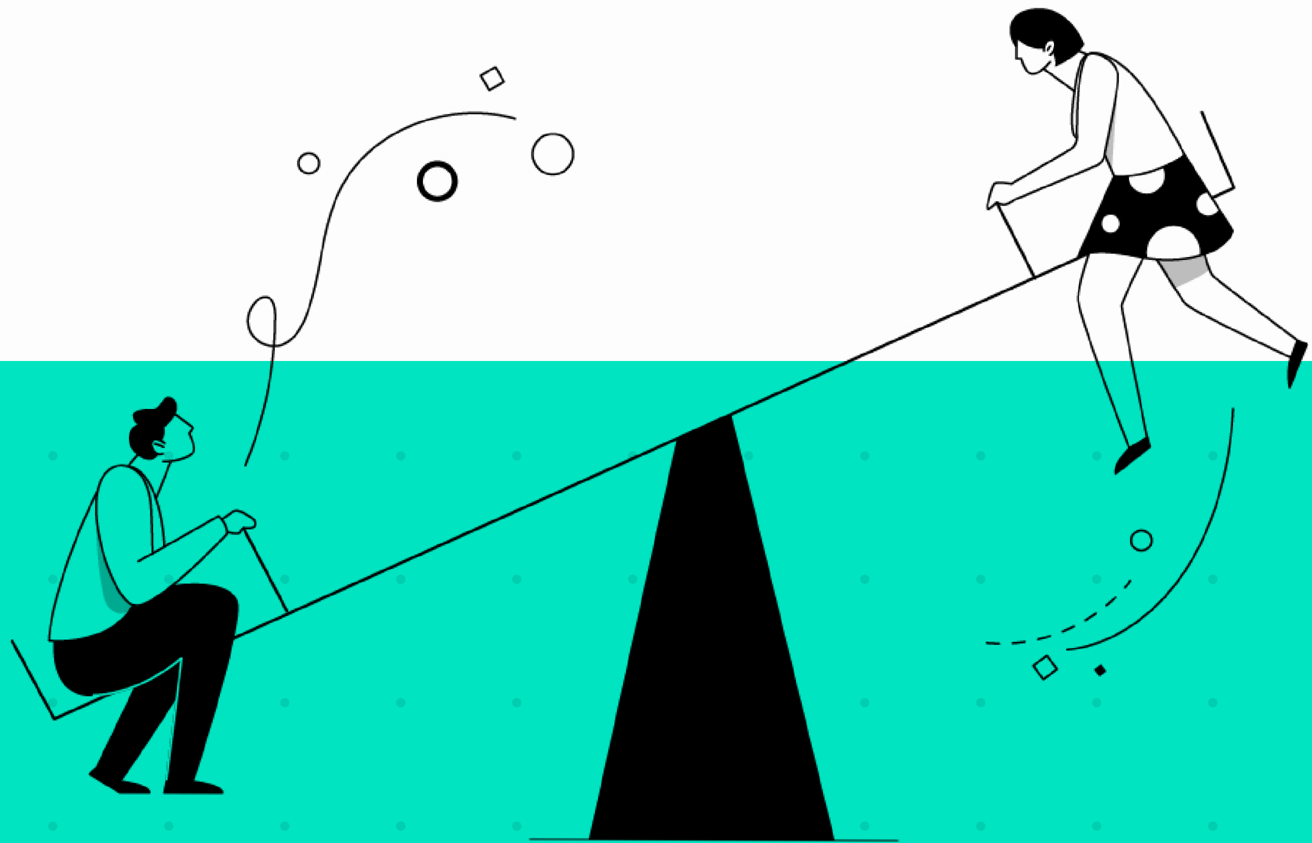
This shows your prospects and customers that you're listening to what they say and that you value them as individuals, not just as numbers on your sales report—and increases retention rates to keep those happy customers sticking with you too.

Get a leg up on your competition.

Think about all the details you've recorded about each client—each interaction and each email that has been saved in your CRM. Keeping all those little details in mind does something incredible to your customer relationships: it builds trust.

Show your customers you value them more than your competition does. Make them feel special in a way your competitors never could.

This ties in nicely with the last benefit of CRMs:



Retain more customers and boost sales.

According to a study conducted by Harris Interactive, 89% of customers stopped doing business with one brand and began buying from another because of a poor customer experience.

While you can't control a rogue teammate who's actively treating customers badly for whatever reason, you can control how you manage customer information, points of contact, and relationships. In other words, with the help of a CRM, you can improve the experience that customers and prospects have with your company.

Humans feel appreciated when they're treated as individuals, and you must be able to do this in order to build meaningful business relationships.

EPILOGUE:

CRM and Its Impact on ROI

Your CRM has hidden talents and now, you've discovered all of its secrets.

So many companies have been missing out on valuable features that are built into their CRMs, paying for multiple subscriptions to tools and software, and sometimes even losing valuable prospect information in email chains and phone calls that never got logged.

By exploring the capabilities of your CRM, you'll be saving time for your team and money for your business. Not only that, your sales team will also be able to work more efficiently through different pipelines to build customer loyalty and boost company revenue.

CRM is much more than just a contact database. It’s a productivity tool, a communication system, sales forecaster, and more. Use it to its full potential.

What will you do differently with your CRM?

Request a demo.

Interested in learning more about how Copper can help your company build better relationships?

Enter your info in the form here and a Product Expert will be in touch shortly.

:copper