

# Customer Relationship Management (CRM) for Technology

**Customer Relationship Management (CRM)** is a system created to improve customer relations. Businesses use a CRM strategy to collect and manage customer data for analysis. The goal is to improve customer service and customer retention rates, thereby increasing sales.

CRM systems collect data from various contact points between customers and businesses. Contact points include:

- websites
- telephone
- chat
- social media
- marketing channels

## CRM Data

The basis of CRM software is to gather comprehensive client information into a central database. Each client and every encounter is integrated into the database. This database is easily accessed to extract profitable information for sales and marketing applications.

Data is compiled to provide associates with detailed information on each customer. Armed with this data, associates are more prepared, ergo more likely to close a sale. CRM data supplies:

- personal details
- purchase history
- purchasing behavior
- past issues with customer

## Integration: CRM/TCT

Integrating CRM with The Call Tracking (TCT) software adds functionality to both systems. Tracking is an invaluable process in both marketing and customer relations instances. Digging deeper into the customer experience allows for in-depth analysis of every interaction.

CRM/TCT integration also provides management with the ability to track profitable interactions as well as staff productivity.

## Available Features

Advanced features of CRM increase the ability to utilize both performance and productivity indicators. As a CRM strategy begins to provide results, added features can be added to further increase performance.

## Automation

Many time-consuming tasks can be automated to improve response times and free associates for other tasks.

**Marketing Automation** enables users to automate repetitive tasks. A task could include automatically sending an email with attached marketing materials to prospects.

**Sales Force Automation** can be as simple as automated order processing. It can also be a complex system handling a variety of tasks including sharing information, inventory control, tracking orders, and creating sales forecasts.

**Contact Center Automation** improves the customer experience by optimizing the call process. Automated tools allow agents to focus on the caller, resulting in lower handle times and increased first call productivity.

**Workflow Automation** is a process that more easily streamlines processes to improve productivity. The technology increases efficiency by improving coordination of activities involved in processes, especially those involving multiple staff members.

## **Management**

**Lead Management** tracks leads generated by multiple sources. The data is then more easily accessed from one centralized location.

**Human Resource Management** tracks employee data to enable HR departments to more efficiently manage the workforce. Data is gathered in a central location including contact and benefit information, performance statistics and more.

## **CRM Technology**

There are several variations of CRM software available. CRM needs vary according to business size and other factors. Small businesses must approach CRM differently than large corporations.

### **On-Premise CRM**

For larger companies, on-premise may be the best choice. In this instance, the company purchases a software license. The software is then installed on the company's own servers. Because the software is now "owned," the user assumes the responsibility and any costs associated with maintenance, including upgrades. This is a more complex system and more suitable for businesses housing their own IT Department.

### **Cloud-Based CRM**

"The Cloud" has gained a great deal of popularity in the past few years. Most businesses and many individuals use a cloud service, at least for backup storage. Cloud data is stored on an accessible, external server located offsite. The cloud is accessed via the internet. In most cases, the server host provides for installation and maintenance, including all upgrades. Cloud-based services are subscription-based with monthly or annual payments.

The "Cons," in regard to cloud-based services, include data security issues. This remains the best choice for small businesses. Entrepreneurs just need to research the company and read reviews before choosing a cloud.

### **Open Source CRM**

Open source software is cost-free technology. With Open Source CRM the software is freely available online, at times downloadable, for distribution and modification. Open source CRM systems are customizable. Although open source options can be an asset, they are usually less user-friendly than commercial products and support is limited or nonexistent.

## **Implementation**

There are a great many ways that CRM practices are being implemented. Engaging with customers and prospects is the ultimate goal of every marketing campaign. CRM allows for the tracking and analytics of actual client contact on a variety of platforms.

### **Social Media CRM**

Social media provides a public platform for customers to share experiences with commercial entities. It is a place to voice compliments and complaints. Customers must be engaged to create two-sided conversations; to connect, forge and improve relationships. Social media also provides customer sentiment regarding specific brands.

### **Mobile CRM**

With the extraordinary pace of business and a smartphone in virtually every pocket, Mobile CRM is essential. CRM apps offer sales and marketing professionals access to prospective leads and customer concerns in real-time.

### **The Bottom Line**

The Call Tracking system integrates our CRM services to create cost-effective strategies that are easy to manage. Our systems provide lead capture services, specific to business size, type and preferences. We offer standard online forms to collect prospect information as well as advanced features utilizing state-of-the-art technology.

Whatever your company's size or needs, The Call Tracking system can integrate a CRM strategy to increase your bottom line. Increasing your bottom line increases ours as well. [Call today for a free consultation!](#)