



Stakeholder Value Returned from the Benefits of CRM:

An integrated CRM (Customer Relationship Management) system is a component of business improvement strategy focused around the customer. It produces a **multiplication** of results throughout the organization. The following is a listing of benefits to specific stakeholders in an organization.

The business owner(s)

- Higher net profitability with increased net sales and reduced operating costs.
- A system that can scale to your growing business
- Business success and their vision achieved
- Improved ability to grow the business that is customer focused.

The VP of Sales and Sales Manager

- Ability to view sales opportunities stuck at a milestone and needing sales coaching.
- Shorter sales cycles for improved sales efficiency.
- Quicker to get new salespeople up to speed and productive in selling
- Higher lead to close ratios

The Sales People

- Ability to provide a positive prospect/customer experience in building the relationship.
- An efficient and consistent sales process for various target markets
- Ability to provide the customer with quick feedback on related open or close support/service issues.
- Access to current products/service provided to determine up-selling or cross-selling opportunities
- Access to Customer AR account information- aging balances, open invoices



The Sales People (continued)

- Higher confidence in selling.
- Easier access to information while in the field
- Decrease time in the sales cycle so they have ability to work more opportunities
- Faster qualification

The Customer service/support Manager

- Less turnover in customer support staff
- Faster support call resolution
- Quick ramp up time for new service representatives
- More calls resolved by CSR's instead of escalated up.

The Customer Service representatives

- Ability to provide a personal touch using personal information and quick access to their account information.
- Personal satisfaction- become a hero in the eyes of the customer

Business Development/Marketing manager:

- More effective marketing campaigns to targeted prospects
- Faster feedback from Sales results by linking campaign to sale
- More effective marketing materials for the sales person

Financial perspective: CFO/Controller/Accounting Manager

- Happier customers pay their bills- less time in the collection and credit memo process.
- Reduction in costs of Administrative personal
- Less employee turnover.
- Reduction in paper documents and filing system.
- Improved efficiency using known business operational processes
- More sales revenue and net profit



The IT department

- A scaleable system that can grow and not have to be replaced in a few years
- A reliable and relational database backend that reduces the time for support and troubleshooting.
- A Crystal reporting system for easier report modification and creation.
- A highly configurable system that also has visual customization tools build on Microsoft technology.
- A highly configurable security system to meet your business needs.

All other employees

- Increase in productivity by using one main system that has the information and processes they need for a consistent customer experience.
- Boost to employee satisfaction