

Customer Relationship Management (CRM)

Customer Relationship Management (CRM) software is very significant tool for any sort of businesses to deal with number of customer interactions as well as data all through the whole customer life cycle. This software is basically intended to aid organizations in building and maintaining relationships with new as well as already existing clients.

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Preamble

In a constantly rising competitive marketplace, it is extremely vital for a business to share true information to the correct person at the accurate time; otherwise business will go down its chances to sale products or services. Customer Relationship Management software is the merely answer that can assist business to exchange a few words with prospects or consumers appropriately. For any CRM application, main objective is to allow an organization to recognize customers' want and deeds and offer superior quality of service. It facilitates to hold existing clients and detain fresh opportunities by building a strong bond between an organization and consumers. CRM can evaluate data and produce reports whenever essential.

"A business totally dedicated to consumer Service brilliance will have only solo concern about profits. They will be pathetically huge."

By Sir Henry Ford

Types of CRM

Customer relationship management (CRM) systems can be enormously helpful to both small and big businesses where client management is important. The system permits the company to better serve clients and customers, as well as potential clients/customers, by putting jointly information from diverse departments of the company and showing them in a consistent approach.

THERE ARE DIVERSE TYPES OF CRM SYSTEMS & SOFTWARE SOLUTIONS. LET'S TAKE A LOOK

Strategic CRM

Strategic CRM puts the customers on the first place in the business. It gradually assembles, separate, and relate all the information of the customers and the latest market trends to come up with the enhanced value proposition for the consumer. The business deems the customer's' right significant for its continued existence. In comparison to Product-Centric CRM (where the business presumes customer necessities and focuses on increasing the product that may sometimes lead to over-engineering), here the business continually keeps learning about the client needs and adapting to them.

These businesses know the buying activities of the purchaser that pleased clientele purchase more commonly than rest of the clients. If any business is not allowing for this type of CRM, then it risks losing the market share to those businesses, which excel at strategic CRM.

Operational CRM

Operational CRM is leaning towards consumer-oriented business procedures such as marketing, selling, and services. It contains the following automations: Sales Force Automation, Marketing Automation, and Service Automation.

Salesforce is the most excellent appropriate CRM for big recognized businesses and Zoho is the greatest CRM for increasing large or small-scale businesses.

1. SALES FORCE AUTOMATION

SFA is the technology that is used for the supervision purpose on different activities. It focuses on the cycle of sales and on the common terminology that comes in the sales issues in front of all the business employees.

IT COMPRISES FOLLOWING MODULES –

Product Configuration - It allows salespersons or consumers to automatically draw the design of the product and finalize the price for a modified product. The design will be based on the if-then-else structure.

Quotation and Proposal Management - A quotation for the price of products will generate by the salesperson with the proposal for the clients by filling details like customer's name, requirements for delivery, code of the product, number of pieces and many more.

Accounts Management - It handles inner entries, total of credit and debit amount based on different transactions and transaction of stores for the purpose of maintaining records.

Lead Management - It allows the customers to meet the criteria leads and assigns them to suitable salespersons.

Contact Management - It is filled with the features such contact details of customers, calendar for salesperson, and automatic dialing numbers. All these record is stored in the computerized form. With this application, users will effectively communicate with their clients.

Opportunity Management - It allows users to identify and track the leads by seeing the status of the leads to the closure and ahead of the closure.

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2. MARKETING AUTOMATION

In this phase, market segmentation, campaigns management, promotions and event-based marketing comes. The campaign modules permits the marketing people to access the client-based data for the designing, evaluating and executing targeted offers, and communications.

3. SERVICE AUTOMATION

Service automation engages service management, solving issues or cases, and addressing inbound communication. It handles diagnosing and solving the issues about the product. With the Interactive Voice Response (IVR) system, a client can communicate with the business computers by filling appropriate menu options. Automatic call routing to the talented employee can be done.

Analytical CRM

Analytical CRM stand on capturing, interpreting, segregating, storing, modifying, processing, and reporting client-related data. It also consists of interior business-wide data such as Sales Data (products, volume, purchasing history), Finance Data (purchase history, credit score) and Marketing Data (response to campaign figures, customer loyalty schemes data).

Business intelligence organizations that offer client's demographics and lifestyle data over a big area that pay a lot of concentration to inner data for getting detail information about the clients.

Analytical CRM can locate diverse selling strategies to different consumer segments. In adding together, diverse content and technique can be offered to different client segments. For customers, analytical CRM offers modified and appropriate solutions to the problems. For businesses, it offers prediction for sales, and client gaining and retention.

Collaborative CRM

Collaborative CRM is an arrangement of resources and approaches in between different businesses for knowing, obtaining, increasing, maintaining, and holding valuable customers.

Collaborative CRM allows smooth communication and dealings among businesses. Though traditional ways such as air mail, telephone, and fax are used in communication, collaborative CRM employs new communication systems such as chat rooms, web forums, etc.

Case study - Trilogy

Site URL : www.trilogyquote.com

About

This CRM System is used to provide a complete control on the quote management and machine management to sales staff and dealers and to the team members and suppliers.

Features

- Dynamic Quote management User can generate Quote for Customer or Dealer. They can send Quote to Customer or Dealer by email with attached Quote PDF or generate PDF which have dynamic data from the configured template. User can assign an accessories for brand and model.
- Manage Customer and Dealer Customer and Dealer management with smart search facility
- Template management Manage Quote and Email template with dynamic fields
- Service management Manage service with its reports and financial parameters. User can set reminders for their service.
- Reports Generate dynamic reports based on the selected parameters.
- Machine management Manage machines with its brand and model. Assign machine to customer with Images and Video upload/download functionality.

Background

An USA based machinery company required a tool to manage their daily work easy and automatic. Company have large network for the machinery with many brands and models. Company works with Quote the model by their staff and sales person and then they do inventory for the machine. They are providing the service for machine related to new and old.

Challenges**Flexible CRM System With Quote Management**

- Dynamic quote details generating from the quote template, HTML, CSS, dynamic variable fields.
- Convert the quote letter in PDF with all the HTML tags and content.
- Important large data in our system with current database structure.

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Our Solution**Manage Your Quotes Easily With CRM System**

- TCPDF library with plug-in for generating PDF from dynamic HTML content for any font and HTML tag.
- Import old large data for making system work with the prepared script to get the data from the old database.
- Import the old database structure with its actual relationship.

Phases**Phase 1 - Requirement Gathering**

In the first phase, we gather requirement of client's require CRM system by scheduled meeting with their team. Based on that, we prepared SRS and wireframe of Staff and Admin users. After finalize the requirement we design the wireframe to clear the flow.

Phase 2 - Design

In the second phase, we have prepared the normalized database structure as per the software requirement specification. Also, configure the CakePHP framework with theme integration. Our technical lead defined class diagram and functional document to smooth the development for best CRM system. Also, we designed the test cases for the Quality assurance purpose.

Phase 3 - Development

In the third phase, with the SRS, Wireframe, Database structure, Class diagram and Functional document, we start the development module based. With the use of CakePHP robust PHP framework and MySQL back end, we developed a large CRM system as per the client requirement which has good performance with large database.

Phase 4 - Quality Assurance

In the fourth final phase, we focus to test the scalable and robust CRM system with load testing as there will be large data expected by client. We performed all the test cases for each module to ensure that CRM system will work desired.

Result (Achievements)**Great Achievement We've Desired For**

Finally, we succeed to provide the system which client actually wants. Client provided the positive feedback on the system and we have submitted this CRM system on client server successfully and achieved client happiness and satisfaction.

Benefits

Applying a customer relationship management (CRM) solution involves substantial time and expenditure. Though, there are a lot of possible benefits.

A chief advantage can be the development of better relations with your present consumers that can lead to:

- improved sales through superior timing due to anticipating wants based on momentous trends
- analyzing necessities more efficiently by considering precise client requirements
- cross-selling of additional products by mentioning and suggesting better options or improvements
- recognizing which of your clients are money-making and which are not

This can show the way to superior marketing of your products or services by highlighting on:

- efficient targeted marketing interactions meant for specific consumer wants
- special approach and the growth of innovative or enhanced products and services in order to thrive business in the upcoming years

Eventually, this will lead to:

- superior client satisfaction and maintenance, ensuring that your high-quality reputation in the market continue to develop
- amplified value from your obtainable clientele and compact cost connected with supporting and servicing to them, growing your whole effectiveness and reducing whole cost of sales
- better productivity by focusing on the gainful customers and dealing with the unbeneficial in more cost effective modes

About Agile Infoways

Agile Infoways Private Limited is an offshore development outsourcing IT company. Incepted in the year 2006, Agile Infoways is doing an astonishing work on the ground of IT fraternity. We have the global presence in India, USA as well as Canada with a team of 220+ in-house talents. Our commitment and belief to achieve the best is making us the most demandable company globally.