

Your Complete CRM Handbook

Everything you need to know to get started with CRM



A mockup of a CRM interface. At the top, it shows a user profile for "Brian Lee" with a "Loyal customer" badge. Below this is a "Customer 360 ID" section with tabs for "Profile", "Activity", "Predictions", and "Notes". The "Activity" tab is selected, showing a line graph and a funnel chart. To the right of the interface are four circular icons: a multi-colored ring, a sales icon, a service icon, and a marketing icon. At the bottom right, there is a button labeled "Analytics" with a plus sign icon.

- sales
- service
- marketing
- Analytics



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Introduction

CRM stands for ‘Customer Relationship Management’

Customer Relationship Management (CRM) is a technology for managing all your company’s customer information, relationships and interactions so that you can see it all in one place. The goal is simple: improve business relationships and drive growth.

It’s more than just a business buzzword. CRM can help you stay connected with your customers, and address some of the challenges businesses are facing due to the COVID-19 pandemic, such as the need to enhance the digital customer experience or improve collaboration between remote workforces.

CRM can help companies of all sizes drive business growth, and it can be especially beneficial to small and fast growing businesses, where teams often need to find ways to do more with less.

Ready to get started? This e-book will tell you everything you need to know to begin your CRM journey. Over the next five chapters, we’ll dive deeper into topics including:

- What is CRM?
- Six signs your business needs a CRM
- How CRM improves productivity
- How to build your CRM strategy
- How to maximise your ROI

Look out for our ASEAN customer success stories throughout this e-book. You will learn how our customer trailblazers are using technology to scale and grow; reinventing themselves to succeed now and in the future.

But first, let’s go back to basics – what exactly is a CRM?



Chapter 1

What is a CRM?

When people talk about CRM, they are usually referring to a CRM system that helps with contact management, sales management, productivity, and more. It helps companies stay connected to customers, streamline processes, and improve profitability.

A CRM solution helps your organisation focus on relationships with individual customers, service users, colleagues, or suppliers throughout your lifecycle with them. This includes finding new customers, winning their business, and providing support and additional services throughout the relationship.

It gives everyone in your teams – from sales, marketing, customer service, business development, human resources, IT or any other line of

business – a better way to manage the external interactions and relationships that drive success.

By managing your critical customer information all in one place, you can view contact info, follow up via email

or social media, manage tasks, or track your performance, among other benefits.

How do you know if your business needs a CRM? In the next chapter, we'll take a look at some signs.





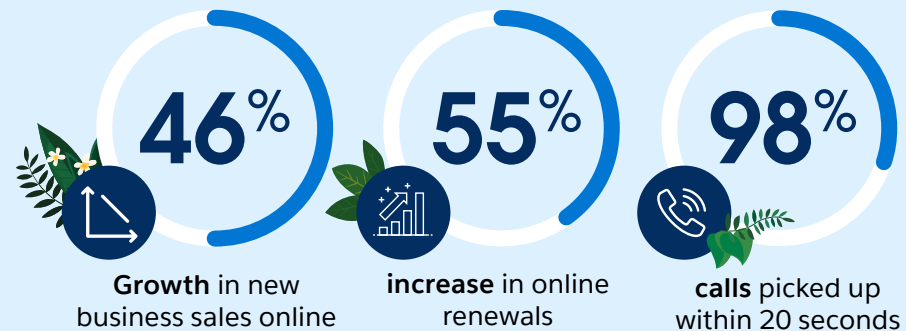
Customer success story

Roojai turns to Salesforce to transform online car insurance in Thailand



Salesforce enables us to apply different strategies depending on which channel the customer is coming from. We are able to get so granular into the data set and can use it to optimise our marketing spend, and focus on the customer journey from origin to conclusion.”

Nicolas Faquet, CEO



Salesforce products used:

[Service Cloud](#), [Heroku](#), and [App Exchange](#)

[Read the full story](#)



Chapter 2

Six Signs Your Business Needs a CRM

When you start out in business, it might be fine to just maintain an Excel spreadsheet or jot down notes about customers and incoming orders. But as your business grows, this sort of record keeping will quickly start to show its limitations. Here are some warning signs it's time to start managing your customer relationships more effectively:



1. **There's no single source for information**

Storing your customer and order data in more than one location, such as multiple spreadsheets or notes stuck to your computer, puts your sales team at a disadvantage. They lack a single view of every customer's contact info, orders, and interactions. ➔



2.

There's little or no visibility

Not only do you lack visibility into how your customers are connecting with your teams, you also lack insight into what your salespeople are doing. This makes it difficult to help them be successful – and keep them accountable.

3.

Reports are hard to create and share

Generating reports and analytics of your sales team's monthly progress against their quota would be ideal. But creating reports manually is unmanageable and often skipped – resulting in no tracking at all.

4.

You don't have a mobile solution

Your salespeople are ready to work from anywhere. Whether they are selling remotely from home or arranging face-to-face meetings, they will be creating valuable information when communicating with potential customers. But if all this new data gets stored on handwritten notes or in files on personal computers, important details get lost, especially when an employee leaves the company.

5.


Resale/upsell opportunities are lost

You don't target prospects based on their value to the business. Instead, you are sending the same types of offers and messages to customers and prospects in very different stages of the buying process, as well as in different industries or geographies.

6.


You don't have a plan to scale fast

What if your business grew from 20 to 200 customers this year? Or even more? Are you confident that your current processes would scale? If you know that your business is going to grow, are you worried about keeping productivity up while scaling up?



If any of these apply to you or your team, don't worry. These are exactly the issues that a CRM system can address.

Next up, let's look at how a CRM makes your business more productive.





Customer success story

Riverplus leads delivery of digital solutions in Thailand



Selling is science. You can't rely on what you think; you need detailed information to forecast and make sales. Salesforce gives us that information and helps us grow."

Choonrakai Singprasert

Owner and Managing Director



Salesforce products used:

[Sales Cloud](#), [Pardot](#)

[Read the full story](#)

Chapter 3

How CRM Improves Productivity

You probably know the old saying, “there never seem to be enough hours in the day.” This is especially true for your sales teams, where time quite literally equals money.

In other words, the more effectively you use your time, the better results for your bottom line. Small businesses grow faster by getting better at providing a steady flow of new prospects, increasing time spent selling, and arming their sales reps with the info they need to close deals more quickly. That is where a CRM application comes in. ➔



According to the latest [Small and Medium Business \(SMB\) Trends report](#), over 81% of growing Small and Medium-sized Enterprises (SMEs) in Thailand have a CRM system. A CRM can give you a clear overview of your customers. You can view everything in one place – a simple and customisable dashboard that can tell you a customer’s previous history with you, the status of their orders, any outstanding customer service issues, and more.

Some of the biggest gains in productivity can come from moving beyond CRM as a sales and marketing tool, and embedding it in your business – from HR to customer services and supply-chain management.



Managing your pipeline

Finding time to bring in a steady flow of new customers can be a challenge for a small business sales team. This is often caused by:

- Inability to route leads to the appropriate sales rep.
- A lack of information on potential clients.
- Inadequate knowledge about a prospect before calling.
- Poor visibility and forecasting of future pipeline.

A CRM tool allows salespeople to store data on prospects so the information is ready to go when they meet. Plus, it quickly provides metrics related to visibility and forecasting.



Selling time

Salespeople need time to sell.

Some of the time traps faced by salespeople are hard to overcome, but others can be easily fixed:

- Automation of repetitive tasks gives salespeople more time to concentrate on closing.
- Providing one channel for salespeople to share information and connect eliminates endless email loops and phone tag.
- Making the switch to mobile can eliminate downtime and increase communication, which is a big challenge for a sales team on the go.

The right CRM system syncs with mobile devices anywhere, anytime via the cloud. Your whole team can be on the same page and have the most current information at their fingertips. ➔





Better intelligence

Companies that embrace artificial intelligence (AI) will be able to create the modern experiences their customers expect. Businesses will have access to the analytics, computing power, data, and ease of use that will transform how they approach their customer relationships.

AI will help business leaders discover critical insights about customers and their preferences, predict the best actions to move relationships forward, and recommend and automate actions to increase sales productivity.

Integrating AI and CRM essentially allows for automated customer reports, efficient data capture, and even a prediction of future customer behaviour. It's a whole new way of connecting to your customers and prospects, with intelligence powering a new era of customer success. →

Here are three ways in which salespeople can use AI to create more powerful opportunities and close more deals:



Data is automatically captured, enabling salespeople to focus on the most valuable leads first.



Predictive sales helps salespeople capture new opportunities and forecast potential sales.



Digital assistants analyse relevant news about each prospect and customer, helping salespeople become insight sellers.





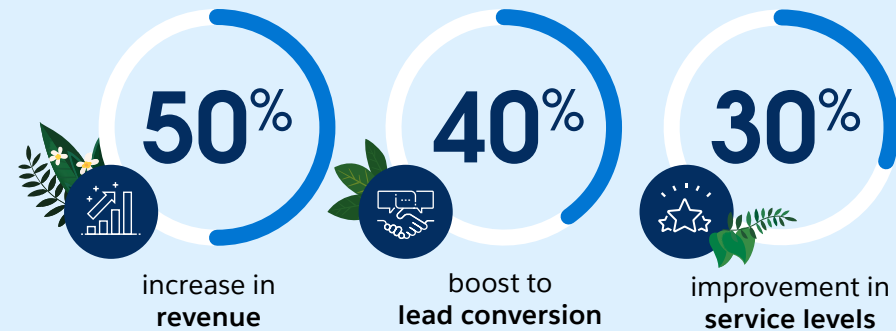
Customer success story

SmartCost harnesses the power of data with Salesforce



With Salesforce, we can also use data and learnings from one business unit to enable cross-sell opportunities across the organisation. We would like to be a trusted partner for our customers in every industry. Insightful customer data from Salesforce can make this plan come true. Salesforce is the piece that completes our big data jigsaw.”

Krittakorn Wongsuttapakorn
Founder and CEO, SmartCost



Salesforce products used:

[Sales Cloud](#), [Service Cloud](#), [Pardot](#), [Tableau CRM](#)

[Read the full story](#)



360-Degree View of the Customer

For successful prospecting and pitching, you must gather vital information on potential clients. But finding time to do that can be hard when you're also trying to make your month. CRMs help solve this problem by collecting valuable customer data, including:

- Client history
- Current client preferences
- Client social media presence
- Past interactions with a client
- Client infrastructure details

Step out of siloed teams with a single view of the customer across cross-functional teams and departments. A single view of the customer will always put them at the centre of everything you do and create a seamless experience.



Don't forget to think mobile

The mobile sales team

As you consider CRM solutions, it's important to note that the modern sales team is no longer confined to their desks for eight hours a day. They are always on, always connected, and always on the go. When considering any new tool, including a CRM, you should make sure the technology enhances this shift in productivity and fits into your sales team's existing workflows.

Mobile CRM tools

Make sure the technology you are considering does not just add mobile functionality as an afterthought. Solutions like the [Salesforce Mobile App](#) were built with a team's productivity in mind. Designed with apps and features

that streamline the sales process and enhance everyday operations, a true mobile CRM can mean the difference between a solution that merely helps your business, and one that revolutionises it.

Now that we've made the case for why a CRM matters to your business and how it improves productivity, let's look at how you can craft a CRM strategy.



Chapter 4

How to Craft a CRM Strategy

Building a successful CRM system isn't just about choosing the right technology, as significant as that is. You also need the right plan in place from a business perspective. Here are seven basic steps to build a winning plan:



1.

Define your vision

Some people dismiss vision statements as a waste of time, but successful sales leaders know the value of having a clear, repeatable, action-oriented vision that your team can rally around. Your vision can be many things, from becoming the market leader for sales in your region, to redefining customer service within your industry. Make it aspirational enough to have an impact, and clear enough so the entire organisation can understand it.

2.

Define your strategy

Strategy is what makes your vision achievable. Say you want to be a market leader for sales. Do you do this by competing on price, or by offering different products, or by emphasising your great after-sales service? →



Customer success story

Zenyum is helping Asia smile more with Salesforce



Speed is one of our core values. Salesforce has helped us build one of the fastest growing consumer brands in Asia. The systems and processes we now have in place can scale to drive future growth.”

Julian Artopé
CEO, Zenyum



8x
improvement in
lead activation rate

Salesforce products used:
[Sales Cloud](#), [Service Cloud](#),
[Experience Cloud](#)

[Read the full story](#)

3.

Define your business objectives

Business objectives are where vision and strategy get translated into day-to-day work. A common mistake when implementing a new CRM system is to replicate all your old business objectives and processes, complete with their inefficiencies. Instead, view your implementation as an opportunity to review and optimise how you work.

4.

Get your team on board

Executive sponsorship is vital for your CRM vision, strategy and business objectives, and for a successful rollout. A lack of executive sponsorship is one of the top five contributing factors to CRM failure.

5.

Identify the metrics

“You can’t manage what you can’t measure” is an adage attributed to many business thinkers. Metrics should be visible to everyone, and this means creating dashboards for all levels of the organisation, from salespeople and managers, to the executive team.

6.

Prioritise your initiatives

You’re not going to get everything done at once, so decide what’s most important to deliver first. Training is often the priority so everyone is ready to use the new CRM system as soon as it’s available.

7.

Define your roadmap

You shouldn’t look at building an effective CRM system as a “big bang” event. Yes, a successful rollout is vital, but being able to deliver enhancements and new features after you go live is equally important. Plan beyond launch day and consider what other capabilities you need to deliver for the business.



Chapter 5

Maximising Your ROI

Here are some **best practices** to remember to help you get the most out of your CRM and maximise your ROI from [Karen D. Schwartz](#), industry expert and technology writer:



Choose a cloud-based CRM solution

All major CRM vendors offer cloud versions of their apps. Choosing this software-as-a-service (SaaS) model means companies no longer have to deal with things that on-premises CRM apps demand, like servers, software issues, and new version upgrades.

Integrate with applications that provide value

Take advantage of new business and social applications that are out there, and integrate them with your CRM system. These include marketing automation and accounting software, plus key social tools, which allow your company to follow people, information, and groups on social networks, and capture real-time data.

Allow for mobile integration

Make everything accessible via mobile devices for your sales teams so they can work on the road – things like reviewing correspondence, managing contacts, and accounts. The integration should also ideally work with back-office systems, social networks, and web conferencing. ➔



Customer success story

Katalon scales up for global growth with Salesforce



We had minimal sales, customer success and marketing teams. We didn't need a large team because Katalon is a product-led company, so we leveraged Salesforce as the main engine to acquire, retain and grow our customer base. We also wanted the scalability to move up market and target the enterprise segment.”

Daisy Hoang

SVP Sales & Success, Katalon



Salesforce products used:

[Sales Cloud](#), [Service Cloud](#), [Salesforce Platform](#), [Salesforce Inbox](#)

[Read the full story](#)

And so you are fully covered, here are some **practices to avoid** when working to maximise your CRM ROI, from CRM journalist [Christopher Bucholtz](#):

Infighting between sales and marketing

CRM data is valuable when used to qualify leads for the sales department and to show which marketing campaigns lead to closed sales. But these insights can be missed if sales and marketing don't work together. Before you do anything else, get both departments in a room to map out common goals and to discuss how to use the data.

Generating reports for the sake of it

The right CRM application can present data in an almost effortless preformatted report. But this analysis will do you no good if it is ignored. Take the time to not only read the reports, but to understand and act on them when needed.

Building 'relationships' with customers

CRMs are an excellent tool to connect with your customers and build relationships that grow over time. But don't just assume that everything is fine and well. Be aware that customers evolve and change, and your business may need to change with them.



Conclusion

Time to Take the Next Step



Any successful business should start with a foundation of great customer relationships. It is never just a transaction between the buyer and seller – it's a relationship in which you, as the seller, connect with people who need your product or service.

As your company expands, these connections become more sophisticated. You need a single, 360-degree view of your business, so that your teams can share information when they are contacting customers.

A CRM system can serve as a vital nerve centre to manage the customer information needed in a growing business. In a world where the most successful companies are customer focused, CRM apps put the customer at the centre of everything.

So what's next? ➔

Get Started with CRM Fast

Few CRM solutions are one-size-fits-all – your business is unique. But there are some easy ways to get started with Salesforce products. These four products are often good starting points for some of small and fast-growing businesses' biggest priorities:



sales cloud

“I want an empowered sales team and more accurate customer data.”

Automate manual admin tasks, reduce the risk of human error, capture more accurate insights and increase productivity.

[Read more about Sales Cloud: English](#)

[Read more about Sales Cloud: Thai](#)



pardot

“I want to find more customers.”

Create easy, personalised nurture journeys that connect your marketing and sales teams.

[Read more about Pardot: English](#)

[Read more about Pardot: Thai](#)



service cloud

“I want to make it easy for customers to interact with my business.”

Deliver personalised customer support faster and more efficiently, across all channels.

[Read more about Service Cloud: English](#)

[Read more about Service Cloud: Thai](#)



“I want to visualise and understand data to drive growth for my business”

Make data-driven decisions to drive business priorities, growth and deepen long-lasting customer relationships.

[Read more about Tableau: English](#)

Learn more

Want to learn how you can leverage technology to reshape your business and meet customer expectations now and in future?

Here are some free resources to bring your company and customers together.



1. Salesforce for Small Business



Salesforce is the world's No.1 CRM solution for small and medium businesses. It's cloud-based and easy to use, making it an ideal solution for growing businesses.

[Watch the demo](#)

2. Small Business Solutions Overview



Find out how Salesforce supports small and medium businesses, including information for sales, marketing, and service teams. Get all of the essential details on getting your CRM up and running in one place.

[Learn more:
English](#)

[Learn more:
Thai](#)

3.

Small Business Resource Centre



Discover other useful resources with guides on just about everything you need to help your business grow.

[Find out more](#)

4.

Customer Success Stories

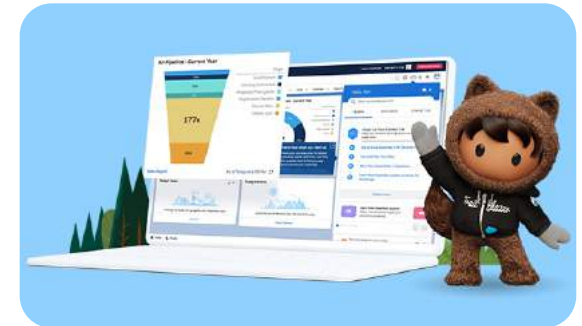


Find some inspiration by exploring how Salesforce helped other businesses just like yours to grow and succeed.

[Read more success stories](#)

5.

Get started with free trial



Sell smarter, keep customers engaged and get started fast with #1 CRM reimagined for small business. Try for free now.

[Try for free](#)



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