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The key to manage your customers.

CRM

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1. Introduction

Today the customer is or should be at the centre of any business. Customers have the final decision on the purchases they make, and their decision making is influenced by a variety of factors. This can mean the growth or decline of any company's sales strategy. Adapting services or products to their needs and listening to their point of view is absolutely essential. For this reason, establishing a customer relationship strategy is necessary.

The ultimate goal of customer relationship strategies is to create a connection between our company and the customer, which means the customer to stay as customer and to buy our products again.

One of the main ways to develop a fluid relationship with the customer, through which direct communication channels can be established, their needs can be listened to and analysed, bringing value to your business, is the development of a digital marketing and a sales force strategy, in its relationship with the customer.

Digital marketing is the implementation of a company's commercial strategies, translated into digital media. However, it must be considered that in this type of strategy, in which companies bring their products through digital channels to their potential customers, their decision-making authority is very important, as they are ultra-informed and have a contact network that they can influence in their purchase.



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Considering the decision-making capacity and the power of influence that customers have acquired, in an online marketing and customer relationship strategy for a company's sales force, it is recommended to include a system that allows for adequate commercial management, exhaustive monitoring of the online marketing actions established, as well as direct contact and customer follow-up.

The implementation of a CRM in a customer relationship strategy allows the company to take into account all the information generated in order to adapt the commercial strategy to this information.



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2. ¿What is a CRM?

When we talk about CRM, many questions may arise. Nowadays it is a much talked about topic, but what is a CRM really? A CRM (Customer Relationship Management) is the technological solution that helps companies to manage customer relationships [\[REF-1\]](#).

It is, additionally, a business philosophy and a set of relationship marketing strategies in which a company understands that its most valuable asset is its customers and does everything possible to put them at the centre of its business strategies.

CRM is normally applied in three fundamental areas: sales management, marketing and customer services. In summary, in areas where the objective is to maximise the profitability of the business through customer relations.

When talking about CRM, there are different conceptions of it: as a technology, as a strategy and as a process. The differences are explained below:



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CRM as a strategy and management model [\[REF-1\]](#)

In this sense, the CRM model as a strategy is conceived as a way of acting on how relationships with customers or potential customers should be managed.

The CRM model helps companies to understand and improve the link they have with their customers and their target audience, improving and adapting their commercial activity to their needs. It allows companies to anticipate and design a value-added experience for their customers.

The CRM model not only helps to manage customer relationships, it also helps to manage internal, cross-departmental and cross-functional relationships with suppliers.

Additionally, it is a powerful intelligence unit at all levels, providing a 360° view of the customer, personalising their experiences to fit the business strategy and vision.

CRM as a process [\[REF-1\]](#)

CRM as a process is conceived as a system designed to provide value to the user by projecting a sense of confidence, control and security based on the optimisation of internal operational processes, which will enable anticipation of customer needs.

It promotes the increase of commercial effectiveness and efficiency through the high analysis and segmentation capacity of CRM, with functions such as commercial pipeline, opportunity scoring, lead grading, etc.



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CRM as technology [REF-1]

CRM as a technology is conceived as a product, usually established in the cloud (or on the SME's server), that companies use to record and analyse the different interactions with their customers or users, as well as valuable information about them and to generate valuable information about this relationship.

The information that a CRM can record and analyse can be divided into two typologies:

- › 1. Information that characterises the customer, such as name, surname, e-mail, sector, contact channel, etc...
- › 2. Relational information, i.e., information that is generated in the customer-company relationship, e.g., calls made, complaints, purchased products, etc.

This information is organised by the software to have a complete record of individuals and companies, in order to better understand customer needs and have better conversations with customers.

CRM systems have a flexible architecture that enables secure and useful communication with external systems, creating a unique ecosystem for the business network.

With environments designed to facilitate work: agile and easy to understand. Highly configurable, allowing you to adapt unique internal processes per company, offering more collaborative environments between departments and stakeholders.

CRM also facilitates user mobility, allowing data to be accessed at any time and from any location.



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CRM system basic functions

The following are some of the basic functions that the user will be able to perform with a CRM system [\[REF-2\]](#).

01

Segmentation of the customer database

Nowadays it is of vital importance to have a personalised treatment with each of your customers according to their needs. Customer data can be segmented by target according to their suitability for different departments, such as sales or customer service. With this differentiation of data, the company will be able to know how to deal with each customer and what to offer them according to their needs.

03

Management of commercial opportunities

By means of the information gathered from the company's different clients, CRM allows the design of strategies to increase the possibilities of new commercial opportunities, increasing the company's profits.

05

Management of commercial actions and campaigns

It allows different customer-oriented marketing campaigns to be launched quickly and at a low cost. This will facilitate customer management and allows you to check the results of the campaigns, coordinating and monitoring them in real time.

07

Integration with email

The software must include email integration functionality so that sales teams have the information shared with the customer by email immediately, to speed up work and respond to customers in a personalised way according to their needs.

02

Customer files

For the correct creation of the customer database, files must be created for each customer. In this sense, the CRM allows valuable customer information to be stored, both past and present, which makes it easier for the company to anticipate their needs in its relationship strategy.

04

Case management

the definition of cases and their management is one of the main capabilities of CRM, allowing to solve each one of them, considering their priority, providing the best service to the company's customers. Additionally, it will be possible to monitor the resolution of the different cases, ensuring their management in the shortest possible time.

06

Data analysis and reports

The analysis of information is a time-consuming process and therefore it is important that any CRM includes this functionality as an indispensable service, together with the automatic generation of reports.

Main advantages of the CRM model

Having a CRM in a company has a series of advantages that, in the end, can make a big difference in a commercial strategy. [\[REF-3\]](#)



Client experience

Smooth communication with the customer allows problems or issues to be resolved more quickly and accurately.

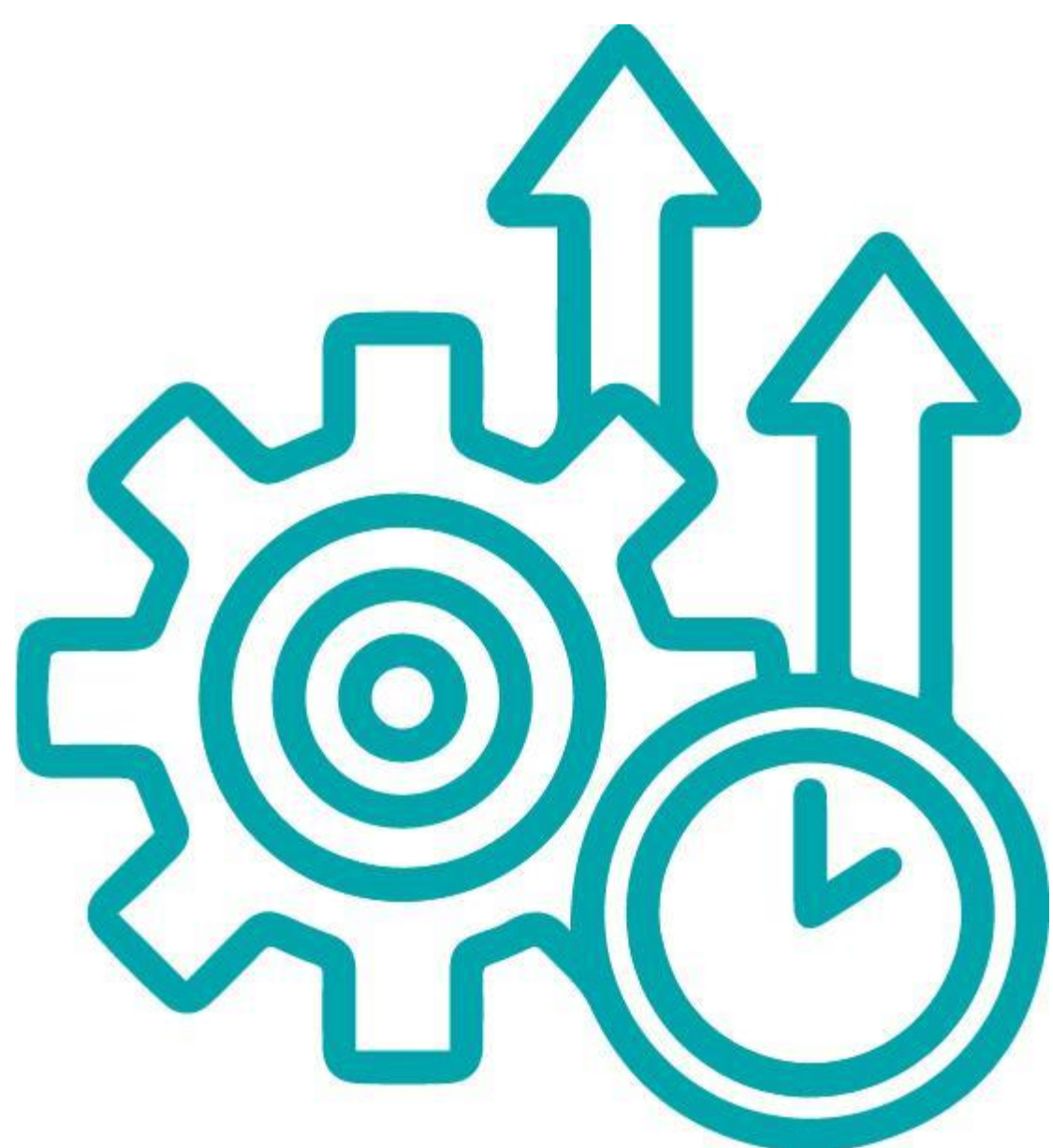
The CRM tool also provides real time information on the needs of customers, thus allowing you to better adapt the service you can offer.



Employee experience

The real-time management of the different cases created in the CRM allows to improve the employee experience in maintaining a good relationship with the customer.

In addition, CRM allows the company to know which potential customers or users have contacted the company, for example, through a call (as long as the customer service department has a CRM in place), which is an advantage when it comes to offering goods and services.



Productivity and efficiency

Improving the sales conversion rate by optimising the process.

As CRM provides a 360° vision of the sales process and the actors or departments involved, it enables faster and more accurate decisions to be made, significantly increasing the company's productivity.

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3. Types of CRM

Now that you know what a CRM is, we will tell you about the existing scope or action areas of the CRMs, the characteristics of each one of them, and if you decide to implement a CRM in your SME, how to find possible tools to help you make it happen. Let's see what types of CRM there are. [\[REF-4\]](#)

Operational CRM

This type of CRM is oriented towards pre-sales and sales service.. It is perfect for SMEs with small to medium sized sales teams, who need to improve their customer relations and sales. It includes typical business functions related to customers: order management, complaints, automated marketing and sales management.

It allows to:

- › **Develop commercial work and interact with potential customers.**
- › **Centralise information on potential and existing customers.**
- › **Manage e-mail marketing campaigns.**
- › **Manage customer service and after-sales processes.**

This type of CRM is recommended if you are looking for something practical and simple. The operational tools are easy to use and suitable if your goal is to achieve good sales management and communication with the rest of the team.

It is the ideal CRM if your SME has a small or medium-sized sales team that will use the tool to improve the sales process and customer relations.

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Collaborative CRM

This type of solutions, more focused on the after-sales process, focuses on establishing a solid link through the offer of products and services that meet the needs of your customers, taking advantage of all the channels offered by a CRM such as e-mail, chat or mobile phone. In this way, the SME will be able to centralise the available customer information and data, provided through the CRM.

It allows to:

- › **Centralise and organise all the information on each client.**
- › **Establish multi-channel communication between the SME's different departments and the customer through different channels.:**
 - Calls.
 - Web.
 - E-mail.
 - Social media.
 - Chat, etc.
- › **Improving the company's relationship with the customer.**

The strength of this type of CRM is that it allows you to centralise all your multichannel customer communications and to manage all of them with the rest of the company's departments.

If your objective is sales management, perhaps this CRM would not be the most suitable, but if your case is similar to that of a call centre or support company, with a continuous contact with the customer, it is perfect for you.

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Advanced analytical CRM

If your business is a little more advanced and the idea is to take a step further towards a complete knowledge of your customer, this is the right CRM, as it identifies actions to gain greater knowledge of your customers' behaviour. Its purpose is the exploitation and analysis of the data that is collected about customers and stored in databases, in order to know in detail the customer's behaviour and offer solutions that are adapted to their needs.

It is interesting for capturing, storing, extracting, processing, interpreting and generating customer information (including behavioural patterns) to improve business processes.

It allows:

- › Offer products or services adapted to the real needs of your customers.
- › Possibility of segmenting marketing and sales actions.
- › Evaluate the results and effectiveness of the marketing campaigns and actions carried out.
- › Structuring all the information collected in databases.

Analytical CRM is a more ambitious CRM that can help you to detect marketing insights that improve strategic decision making. It requires more complex tools so the learning and adaptation process can take a little longer.

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4. CRM Providers

When it comes to decide which CRM provider is the most suitable for a company, there is a report by Gartner, which shows the annual analysis of customer service, sales and marketing service providers, considering a number of aspects. [\[REF-5\]](#)

- › Gartner's perspective on the current ecosystem for customer interaction centre (CEC) technologies.
- › Aspects to consider for businesses and CECs looking to implement these technologies.
- › The specific capabilities that providers of these tools must have.



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On the other hand, it is necessary to consider a series of aspects in order to prioritise which CRM best suits the needs of each SME. [\[REF-6\]](#). These aspects are:

- › The user interface or the importance of the visual design of the tool, if there is the possibility to customise it.
- › The usability or whether the tool is easy or suitable for my company and my employees to use.› Features and functions I need from the CRM.
- › Integration with other tools. This is a necessary aspect to consider in the event that the CRM needs to be integrated or communicate with other tools.
- › Price. There are multiple CRM providers, however there are some with a higher price and others that are free.

Here are the free and paid CRMs that can be most useful for SMEs.



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Paid CRMs

The most important paid CRM providers on the market, also known as "Big Players", work in a simple way. The company contracts these services and pays a fixed annual or monthly licence fee for each user. The most relevant ones are listed below:

Microsoft Dynamics 365 [\[REF-7\]](#)

Microsoft is one of the most important and well-known providers of CRM solutions. In this case, they make a distinction between contracting the CRM software in different modules, and you can also choose an integrated solution made up of different modules. Each module is priced according to the number of users and licences to be purchased. The modules into which the solution is divided are as follows:

01

Sales CRM tools

Generate reports and analysis and collect information about customers with their respective data and purchase history, in order to empower the sales force to drive customer engagement. This tool also provides recommendations that will help the SME find new customers, build customer loyalty and strengthen new relationships.

02

Marketing CRM tools

Designed to help the business find and capture new leads, by generating multi-channel marketing campaigns and aligning the various sales and marketing teams.

03

Customer service CRM tools

This module will empower users to offer support and guided service, in any channel, to customers. Some of its functionalities include problem solving through data analysis and forecasting, and analysis of surveys, forums and social listening for service improvement.

04

CRM tools for field service

Help companies create work orders and help support technicians access customer records when they are away, in order to keep agents in constant connection with customers.

05

Project service automation.

It provides analysis and planning tools to improve project profitability. Additionally, it allows users to anticipate customer needs and offer the best solution.

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Paid CRMs

Salesforce [REF-8]

The CRM tools that the Salesforce giant also offers are divided into different modules, which are described below. As in the case of the Microsoft solution, each of the modules is priced according to the needs and the number of users who will use it.

In addition, no infrastructure or installation is required, Salesforce is in charge of operating the system and the data generated is stored in the cloud, with a high degree of security.

01

Sales cloud

The ideal solution for monitoring the progress of the company's customers. It has capabilities for comprehensive management of customer information and commercial activity, opportunity management, where the sales team's negotiations are detailed, sales channel automation, in order to manage contacts automatically, from the sales opportunity to conversion, among others.

02

Service cloud

Solution for optimising the company's processes and making customer service more efficient. It has capabilities such as the customer management platform, with centralised customer information, with "360° vision", which allows agents to offer a more specialised and efficient service, customer service from any channel or any device and the extraction of reports and dashboards to measure the performance of the customer service team.

03

Cloud marketing

For the creation of personalised experiences and communications for each customer and the possibility of carrying out marketing campaigns in various channels (email, social media, ads, applications or web channels). In addition, it allows the design of communications and their content to be managed, as well as analysing the impact of each of the actions.

04

Salesforce platform

Allows the development of internal or external applications to enable the connection, at all times, of customers, their data and the company, which allows the company's performance to be increased.

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Free CRMs

Free CRM solutions are also available for those companies that consider them. Here are a few of them:

Zoho CRM. It is considered one of the most complete free CRMs in Spanish. It has sales and marketing management capabilities, to manage the performance of the company's sales staff or the possibility of interacting with customers in real time. Like other free CRMs, if you need a greater number of capabilities, they can be purchased separately. The free version allows a maximum of 3 users, 1Gb of storage, for a total of 25,000 records. Additionally, it is a CRM in the cloud, which allows its use on any type of device, fixed or mobile. [\[REF-9\]](#)

Really Simple Systems. It is a free CRM tool with a good user experience. It allows you to work on the move, but it is sometimes limited, as it only allows the registration of 100 customers, has a maximum capacity of 100Mb and is only available in English. It is a suitable option for a retail business, as it manages sales funnels and opportunities. Additionally, it allows integration with Outlook and Google contacts. [\[REF-10\]](#)

Bitrix24 is a digital CRM tool, in which the basic services are free but if a higher level of capabilities is required, these are not free. It is a tool that allows the company to centralise all communication channels (calls, social media or email) in a single tool.

Bitrix24 is a cloud-hosted system and can be configured on multiple devices (available on iOS and Android). There is no user limit, but there can only be one administrator. It is an intuitive tool with a more than adequate user experience, however it only has CRM solutions for customer service (customer database). In its free version, it does not have capabilities for sales and marketing management. [\[REF-11\]](#)

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Free CRMs

SuiteCRM. It is another of the best rated free CRM systems, available in Spanish and capable of adapting to the needs of the company. This programme has no limit in relation to the number of users and has all the functions of a CRM: commercial management, with functionalities such as the registration of leads or the management of opportunities; marketing, with functionalities such as the creation of forms or the segmentation of users; and customer service with functionalities that allow interactions with customers or their follow-up[REF-12]



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5. CRM use cases

There are numerous use (and success) cases in the use of CRM systems. The following are just a few.

1.

Descubre Group case

Descubre Group is a Tenerife-based SME dedicated to the creation of television channels for hotels. In the last few years, they have experienced great growth and needed software to manage their contacts and clients.

With the implementation of a CRM, they were able to manage their clients and potential clients in an agile way, being able to visualise the information from multiple devices, carrying out an adequate follow-up.

In addition, the process of data entry and real-time visualisation by different departments improved considerably. [\[REF-13\]](#)

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2.

FiscoSur case

FiscoSur is a Spanish SME offering legal and economic consultancy services.

After the implementation of CRM software, FiscoSur noticed a great improvement in the immediacy of management and access to customer information.

In addition, by having centralised information, a multi-channel communication with their clients is established, and they can be available at any time to answer their queries or requirements. [\[REF-14\]](#)

3.

McDonald's case

Their growing need for segmentation to obtain the maximum benefit from each customer motivated them to launch an application which, once downloaded by users on any mobile device, provides the company with data on purchase frequency and patterns. Then, this data is analysed and used to offer, in a personalised way, different promotions and loyalty rewards. [\[REF-15\]](#)

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4.

Amazon case

Amazon is an example of the use of CRM to increase satisfaction and achieve high loyalty through, among other actions: sending e-mails to customers with purchase recommendations, sending specific websites for each user taking into account their interests, allowing users to make purchases without having to enter their payment details more than once, offering promotions and establishing a customer loyalty programme, etc. [\[REF-15\]](#)

5.

Apple case

This is one of the most interesting cases when it comes to understanding why to use a CRM. Many people have an Apple device, which requires the user to register their device with an Apple ID. This Apple ID is one of the most effective CRMs, because it links to other devices, remembers the user's selections, makes recommendations based on interests, and so on. Apple thus acquires a constantly evolving set of data about its users and their preferences, enabling it to run fully effective marketing campaigns.[\[REF-15\]](#)

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6. Conclusions

In a business relationship, the customer has the power. It is necessary for companies to adapt to their preferences and needs when offering products or services.

The most effective marketing strategies must be associated with the use of a CRM in order to obtain relevant data that provide information about the customer's tastes or needs.

In this way, CRM is an excellent ally in the improvement of customer relations, as it is possible to carry out, among other things, a segmentation of the customer database, files on each customer and the management of opportunities. In this way, the company will be able to know its customers in detail, as well as those who are potential customers, their needs, main data, etc.



On the other hand, the CRM model will improve the employee experience, since all these data can be consulted in real time by a company's employees, facilitating their daily management as well as their relationship with customers.

Additionally, considering the improvement of the customer relationship and the employee experience, the sales conversion rate will be increased, as well as the speed and certainty when making decisions, which will have a positive impact on the company's productivity and efficiency.

These aspects of the CRM model will facilitate the achievement of your SME's overall objectives, make it grow and promote a dynamic of continuous improvement, among other aspects.

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