

# How to Fuel Growth Using CRM

# CRM: Rocket Fuel for Sales Success!

3 Key Questions to answer

- WHAT?
- WHY?
- HOW?





# **What Can a CRM do for my Company?**

- What does CRM stand for...




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- What does CRM stand for?.....  
-Customer Relationship Management



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- What does CRM stand for?.....  
-Customer Relationship Management
  - What does that mean?
- 

# What Can a CRM do for my Company?

- What does CRM stand for?.....  
-Customer Relationship Management
- What does that mean?

As said by Wikipedia a CRM is...

## Customer relationship management

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From Wikipedia, the free encyclopedia

**Customer relationship management (CRM)** is an approach to manage a company's interaction with current and potential [customers](#). It uses [data analysis](#) about customers' history with a company to improve business relationships with customers, specifically focusing on [customer retention](#) and ultimately driving [sales](#) growth.<sup>[1]</sup>

# What Can a CRM do for my Company?

- What does it mean for the party rental industry?



# What Can a CRM do for my Company?

Are you maximizing your inventory with every event?





# **What Can a CRM do for my Company?**

Where does your company fall in line?



# What Can a CRM do for my Company?

Where does your company fall in line?

No CRM





# What Can a CRM do for my Company?

Where does your company fall in line?

No CRM

Getting There



# What Can a CRM do for my Company?

Where does your company fall in line?

No CRM

Getting There

On The Way

# What Can a CRM do for my Company?

Where does your company fall in line?




**Why should we implement it?**





# Why should we implement it?

- **Value of using a CRM**

- Organization, Focus, Discipline
  - Close More Business
  - Protects your Sales Rep Investment
  - Leave Work at Work
  - Target your profitable customers
  - Measure Performance and ROI
- 

**Why should we implement it?**



**Some Mind-Blowing Sales Stats!**



**② IT TAKES AN AVERAGE OF  
8 COLD CALL ATTEMPTS TO  
REACH A PROSPECT.**

 [TWEET THIS](#)

 **THE BREVET GROUP**

SOURCE: @SIRIUSDECISIONS

④ 35-50% OF  
SALES GO TO  
THE VENDOR  
THAT  
RESPONDS  
FIRST.



TWEET THIS




THE BREVET GROUP

SOURCE: @INSIDESALES

📌 80% OF SALES REQUIRE 5 FOLLOW-UP CALLS  
AFTER THE MEETING. 44% OF SALES REPS GIVE  
UP AFTER 1 FOLLOW-UP.

 TWEET THIS



Fortune hazy. Try again later.

 THE BREVET GROUP

SOURCE: @MARKETINGDONUT

A photograph of Mark Zuckerberg speaking at a podium. He is wearing a grey t-shirt and giving a thumbs-up. In the background, another man in a blue shirt is also speaking into a microphone. The image is overlaid with text and social media icons.

**⑩ 78% OF  
SALESPEOPLE  
USING SOCIAL  
MEDIA OUTSELL  
THEIR PEERS.**




**TWEET THIS**




**THE BREVET GROUP**

**SOURCE: @FORBES**

A woman with long brown hair, wearing a black polka-dot shirt and black boxing gloves, is shouting with her mouth wide open and pointing her gloved finger towards a man. The man is wearing a light-colored button-down shirt and a tan fedora, and he has a pained or surprised expression. The background is a plain, light gray.

**⑬ 91% OF  
CUSTOMERS SAY  
THEY'D GIVE  
REFERRALS. ONLY  
11% OF SALES  
PEOPLE ASK FOR  
REFERRALS.**

 [TWEET THIS](#)

 THE BREVET GROUP

SOURCE: @DALECARNEGIE

**⑪ EMAIL IS ALMOST 40 TIMES BETTER AT  
ACQUIRING NEW CUSTOMERS THAN  
FACEBOOK AND TWITTER.**

 [TWEET THIS](#)

 THE BREVET GROUP

SOURCE: @MCKINSEY

**12 SALESPEOPLE WHO ACTIVELY SEEK OUT  
AND EXPLOIT REFERRALS EARN 4 TO 5  
TIMES MORE THAN THOSE WHO DON'T.**




**TWEET THIS**




**THE BREVET GROUP**

**SOURCE: @TOPSALESWORLD**




15 55% OF THE  
PEOPLE  
MAKING  
THEIR LIVING  
IN SALES  
DON'T HAVE  
THE RIGHT  
SKILLS TO BE  
SUCCESSFUL.

 TWEET THIS

 THE BREVET GROUP

SOURCE: @CALIPERCORP

**16 CONTINUOUS  
TRAINING GIVES  
50% HIGHER  
NET SALES PER  
EMPLOYEE.**

 [TWEET THIS](#)



 THE BREVET GROUP

SOURCE: @ATDSALESENABLE

18 IT TAKES 10  
MONTHS OR  
MORE FOR A  
NEW SALES REP  
TO BE FULLY  
PRODUCTIVE.



TWEET THIS





THE BREVET GROUP

SOURCE: @BRAINSHARK



①<sup>9</sup> RETAINING  
CURRENT  
CUSTOMERS IS  
6 TO 7 TIMES  
LESS COSTLY  
THAN  
ACQUIRING  
NEW ONES.

 TWEET THIS

 THE BREVET GROUP

SOURCE: @BAINALERTS

# Why should we implement it?

- Time is Money!



**How is it going to help my company grow?**

# CRM TOOLS

Stay on top of your leads, schedule sales calls & followups, integrate your workers IMAP email accounts, & automatically match emails to the appropriate customer.

# How is it going to help my company grow?

## SALES LIST FOR FOLLOW-UPS

Organize your sales reps so follow-ups are easy and regular:

- Customize filters to follow-up with each new lead, every few days
- Easily monitor your sales reps to see if any leads are being missed
- See your win/loss rate of leads

Activate Now »

Lead Filters <small>help</small>	Date	Organization	Status	Time	City, State	Last Name
<b>Preset/Saved</b> choose filter ▾	<input type="checkbox"/> 6/8/2016	ted albertson2	Contracted	8:00pm - 11:00pm	Ravenna, OH	albertson2
<b>Date Range</b> Event Date ▾ Next X days ▾ 365 >	<input type="checkbox"/> 4/28/2016	ted albertson	Contracted	12:00pm - 6:00pm	Diamond, OH	albertson
<input checked="" type="checkbox"/> Event Date: Next 365 days	<input type="checkbox"/> 3/18/2016	Joe Hammer	Confirmed	2:00pm - 7:00pm	Akron, OH	Hammer
<input checked="" type="checkbox"/> Create Date: Last 30 days	<input type="checkbox"/> 3/18/2016	Bill Winters	Contracted	4:00pm - 7:00pm	Maple Heights, OH	Winters
<input checked="" type="checkbox"/> Last Contact Date: Over 3 days ago	<input type="checkbox"/> 3/18/2016	Beth Flugal	Quote	3:15pm - 6:15pm	Columbus, OH	Flugal
<b>Keyword</b> <input type="text"/> >	<input type="checkbox"/> 3/18/2016	Capital University	Hold	2:00pm - 7:00pm	Akron, OH	albertson
<b>Status</b>	<input type="checkbox"/> 3/18/2016	summit mall	Contracted	1:45pm - 7:30pm	Fairlawn, OH	yoates
	<input type="checkbox"/> 3/18/2016	Mikey Freedman	Confirmed	2:30pm - 8:00pm	Akron, OH	...
	<input type="checkbox"/> 2/21/2016	North Life Ministries	Confirmed	12:45pm - 3:45pm	Akron, OH	Crafton
	<input type="checkbox"/> 3/18/2016	christopher beal	Confirmed	2:30pm - 6:30pm	Akron, OH	beal
	<input type="checkbox"/> 3/18/2016	Cathy Davidson	Confirmed	9:00pm - 11:00pm	East Orwell, OH	Davidson
	<input type="checkbox"/> 3/18/2016	Randy Jackson	Confirmed	1:15pm - 6:30pm	Jefferson, OH	Jackson
	<input type="checkbox"/> 3/18/2016	College of Wooster	Confirmed	2:00pm - 6:45pm	Wooster, OH	Muffins

# How is it going to help my company grow?

## ASSIGN TASKS AND SCHEDULE APPOINTMENTS

Use reminders and tasks in the following ways:

- Reminder types: flag that show on the Overview, emails reminder, and/or Google calendar items.
- Link a task with a new lead so that the next time that lead is viewed, you are reminded.
- Combine with our Workers module and schedule your workers sales and other tasks.
- Use permissions to customize your workers experience with the task manager.
- Filter your task list to make sure you are doing the tasks important to you.
- For tasks without due dates, simply enter them so you can work on them when you have time.

The screenshot displays a task management interface. At the top, there's a header for 'Beth Flugal' with a status dropdown set to 'New'. Below this, a task list shows 'Make second contact' with a due date of 2/12/2016. The interface includes a table of tasks with columns for Status, Details, Remind Time, Remind Via, Customer, Assigned To, and Created By. The table contains several rows of tasks, including 'Remember to sell Josh on our graduation package', 'Don't forget to take the plastic dunk tank', 'Call Bob about fire party', 'Make second contact', and 'Secure their summer party'.

Status	Details	Remind Time	Remind Via	Customer	Assigned To	Created By
New	Remember to sell Josh on our graduation package		Badge, Flag	Josh Grovis	Lazy Joe	
New	Don't forget to take the plastic dunk tank				Beth Flugal	
New	Call Bob about fire party	1/22/2016 10:00am	Badge, Email			
New	Make second contact	2/12/2016 10:00am	Badge, Calendar	Beth Flugal	Kim Speedster	
New	Secure their summer party	1/26/2016 10:00am	Badge, Email, Flag, Calendar	Nath Life Mission	Kim Speedster	

## How is it going to help my company grow?

## TRACK TOUCHES WITH YOUR CUSTOMERS

Makes sure you are staying in contact and poised to make another sale.

- New CRM tab on leads shows your communication with that customer sorted by last touch.
- Communication log shows IO emails sent, Task Manager tasks, IMAP emails, phone records, and Journal entries.
- Adds capability to add journal entries, which are notes with date and time stamps.
- See last contact and last customer action date and time stamps that can be used in custom reporting as well.

Dee Clark

cancelled

quote

hold

contracted

confirmed

complete

close

Event

Contract

Schedule

CRM

Maps

Attachments

Auto Emails

Surveys

Log

ing

Last Contact Attempt: 1/10/2016 10:02pm

Last Customer Action: 1/11/2016 8:07am

Date	Time	Type	To	From	Note
1/20/2016	2:31pm	Journal	Dee Clark	demo	I leave a sales note
1/11/2016	8:07am	Email (MAP)	sales@demorentals.com	Dee.Clark@sage.com	Re: Your upcoming event
1/10/2016	1:02pm	Email (IO)	Dee.Clark@sage.com	InflatablesOffice	Customer - Event Reminder
1/7/2016	7:42am	Journal	Dee Clark	lazyeje	She said she's going to book with us
1/7/2016	7:02am	Placed Call	(303) 628-8150	—	
1/6/2016	3:11pm	Task	Lazy Joe	demo	Completed: Call her
1/4/2016	9:02am	Voice mail	—	(303) 628-8150	Hi, looking to book an event with you, call me back
5/22/2015	4:23pm	Email (MAP)	Dee.Clark@sage.com	jeff@inflatablesoffice.com	RE: Fwd: RE: ACH not getting sent to CREDIT - Inflatables Office LLC

ID: 876217 | Created: 1/6/2016 10:26am | Modified: 1/7/2016 8:09am

# How is it going to help my company grow?

## AUTOMATIC SCORING OF YOUR HOTTEST LEADS

Tracks recent customer interactions with your company via phone, email, and website visits.

- Phone calls add to the score of how hot a lead is.
- Clicks of links in emails are automatically tracked regardless of where the link points, and hot lead score is updated.
- Code that you add to your website tracks customer interaction with your website inside your InflatableOffice account.
- New filters allow you to find and sort leads based on how interested the customer is.

Saved Filters  
test

Date Range  
Create Date  
Fixed Range

Keyword  
>

✗ Last Contact Date:  
Over 5 days ago

✗ score: > 4

✗ leads: < 1

Bill Smith

Details Leads CRM Log

Score: 20

Date	Time	Type	
8/8/2016	4:01pm	Journal	Leave a sales note.
7/27/2016	2:52pm	IO	Viewed Quote Form
7/29/2016	2:28pm	Site	Visited Home Page
7/29/2016	2:27pm	Email Open	New Products for 2016

# How is it going to help my company grow?

## IMAP EMAIL INTEGRATION FOR WORKERS

Integrate your IMAP email account to get the following benefits:

- InflatableOffice downloads and matches your emails with leads and customers.
- IMAP emails are shown in the communication log timeline and are easily viewed without leaving IO.
- Choose whether to share your customer emails with other workers at your company or not.

IMAP (incoming) email integration

IMAP settings for Kim Speedster

Integrate Imap email: ☒ Yes ☐ No Allow other workers to see email on leads?: ☐ Yes ☒ No

Email Server:  Port:

Email Login:  Password:

cancel  save 

# STEPS TO CRM SUCCESS

## Step 1

Setup Email IMAP integration so IO can match emails from your email account to customers and leads as well as track last contact and activity stats.

## Step 2

Learn to use the task manager to set reminders for sales follow-ups.

## Step 3

Put in best practices to follow-up with your current customers and leads by setting up CRM filters.

## Step 4

Learn to use the CRM tab where you can see emails, tasks, calls, and journal entries to track communication with your customers.

## Step 5

Prospect for new leads with a marketing plan that incorporates the CRM tools.



# Thanks!

## Any questions?

[www.inflatableoffice.com](http://www.inflatableoffice.com)