How to Fuel Growth Using CRM

2019-06-18 Webinar

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CRM: Rocket Fuel for Sales Success!

3 Key Questions to answer

- WHAT?
- WHY?
- HOW?



• What does CRM stand for?...



What does CRM stand for?.....
 -<u>Customer Relationship Management</u>

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- What does that mean?



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As said by Wikipedia a CRM is...

Customer relationship management

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.^[1]

• What does it mean for the party rental industry?



Are you **maximizing** your inventory with every event?



Where does your company fall in line?



Where does your company fall in line?





Where does your company fall in line?

Getting There



Where does your company fall in line?

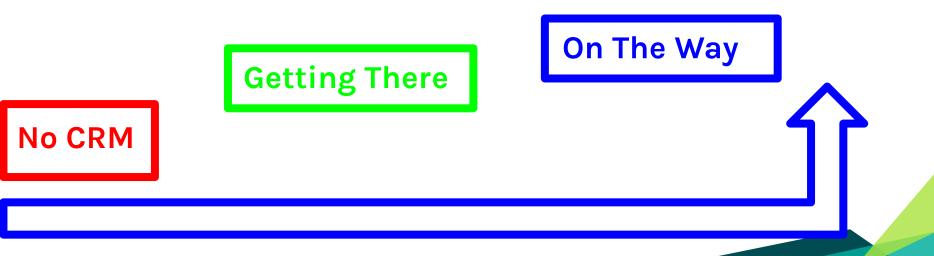








Where does your company fall in line?





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



Some Mind-Blowing Sales Stats!

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

TWEET THIS

E BREVET GROUP

SOURCE: @SIRIUSDECISIONS

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.

Fortune hazy. Thy again later.

TWEET THIS

THE BREVET GROUP

SOURCE: @MARKETINGDONUT



THE BREVET GROUP

SOURCE: @FORBES

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

TWEET THIS

THE BREVET GROUP

SOURCE: @DALECARNEGIE

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

Maill

TWEET THIS

THE BREVET GROUP

SOURCE: @MCKINSEY

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



6 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

© CONTINUOUS TRAINING GIVES 50% HIGHER NET SALES PER EMPLOYEE.

🕖 TWEET THIS

THE BREVET GROUP

SOURCE: @ATDSALESENABLE



SOURCE: @BRAINSHARK

© RETAINING CURRENT **CUSTOMERS IS** 6 TO 7 TIMES LESS COSTLY THAN ACQUIRING NEW ONES. TWEET THIS

THE BREVET GROUP

SOURCE: @BAINALERTS

• Time is Money!





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

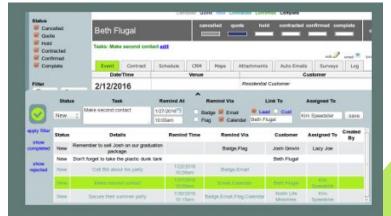
Activate Now »

Lead Filters help		Date	1	Organization	Status	Time	City, State	Last Nan
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Preset/Saved	0	4/28/2016		ted alberson	Contracted	12:00pm - 6:00pm	Diamond, OH	alberson
choose filter •	1000	4/20/2010		teu alberson	Contracted	12.00pm - 0.00pm	Diamond, Ori	alluorsom
Date Range		3/18/2016	1	Joe Hammer	Confirmed	2:00pm - 7:00pm	Akron, OH	Hammer
Event Date Y		3/18/2016		Bill Winters	Contracted	4:00pm - 7:00pm	Maple Heights, OH	Winters
Next X days 🔹		3/18/2016		Beth Flugal	Quote	3:15pm - 6:15pm	Columbus, OH	Flugal
365 >	0	3/18/2016		Capital University	Hold	2:00pm - 7:00pm	Akron, OH	alberson
X Event Date: Next 365 days	0	3/18/2016		summit mall	Contracted	1:45pm - 7:30pm	Fairlawn, OH	yoates
X Create Date: Last 30 days	0	3/18/2016		Mikey Freedman	Confirmed	2:30pm - 8:00pm	Akron, OH	
Last Contact Date:		2/21/2016		North Life Ministries	Confirmed	12:45pm - 3:45pm	Akron, OH	Crafton
Over 3 days ago	0	3/18/2016		christopher beal	Confirmed	2:30pm - 6:30pm	Akron, OH	beal
Keyword		3/18/2016		Cathy Davidson	Confirmed	9:00pm - 11:00pm	East Orwell, OH	Davidson
>		3/18/2016		Randy Jackson	Confirmed	1:15pm - 6:30pm	Jefferson, OH	Jackson
Status		3/18/2016		College of Wooster	Confirmed	2:00pm - 6:45pm	Wooster, OH	Muffins

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.



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				ancelled quote he	old contracted confirmed complete close			
Event	Contract	Schedule	CRM Maps	Attachments Auto El	mails Surveys Log	log di		
st Contact A	Attempt: 1/10	2016 1:02pm	Last Customer Activ	on: 1/11/2016 8:07am				
Date	Time	Туре	То	From	Note			
1/20/2016	2:31pm	Journal	Dee Clark	demo				
1/11/2016	8:07am	Email (IMAP)	sales@demorentals.co	m Dee.Clark@sage.com	Re. Your upcoming event			
1/10/2016	1:02pm	Email (IO)	Dee.Clark@sage.cor	n InflatableOffice	Customer - Event Reminder			
1/7/2016	7:42am	Journal	Dee Clark	lazyjoe	She said she's going to book with us			
1/7/2016	7:02am	Placed Call	(630) 628-8150	-				
1/6/2016	3:11pm	Task	Lazy Joe	demo	Completed: Call her			
1/4/2016	9:02am	Voicemail	-	(630) 628-8150	HI, looking to book an event with you, call me			
5/22/2015	4:23pm	Email (IMAP)	Dee Clark@sage.cor	n joei@inflatableoffice.com	RE: Fwd: : RE: ACH not getting sent to GET) - InflatableOffice LLC			

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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 T	Bill Smith				
Date Range					
Create Date •	Details	Leads	CRM Log	9	
Fixed Range Last Contact Date:	Score: 20 Date	Time	Type		
Over 5 days ago	8/8/2016	4:01pm	Journal	Leave a sales note.	
Keyword	7/27/2016	2:52pm	ю	Viewed Quote Form	
>	7/29/2016	2:28pm	Site	Visited Home Page	
X score: > 4	7/29/2016	2:27pm	Email Open	New Products for 2016	
X leads: < 1					

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.

integrate imap email: 4	Yes No	Allow other worker	rs to see omali o	n leads7: O Y	as 🖲 No	
Email Sever:	nait demonentala.com		Port: 143			
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eman cogine (n	mg/cemprentais.com		Pasoword		_	
					cancel S	savo I

STEPS TO CRM SUCCESS

Step 1

Step 2

Setup Email IMAP integration so IO can Learn to use the task manager to set match emails from your email account reminders for sales follow-ups. to customers and leads as well as track last contact and activity stats.

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