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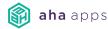
15 Questions to Identify the Gaps in Your CRM Processes

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Sales teams of all sizes are navigating new buying journeys with their prospects and customers. But when internal silos, lack of collaboration and disconnected processes throw up roadblocks, sales people lose ground.

Clear the digital roadblocks

Most organizations today are struggling with CRM systems that haven't kept pace with the digital buyer. To bridge the gaps between customers and your sales team, you need a cohesive CRM solution that improves collaboration, streamlines the sales process and personalizes interactions.

In this eBook, we'll help you identify the gaps in your current system and provide insights into how to correct them. The questions will help you address the key sales and service challenges, including:

› Deliver clear, complete information
› Provide insights into your buyers
› Offer intelligent guidance
› Promote engaging customer service
› Support proactive field service

Read on to help your sales team join customers in the digital world.

01 Does your CRM system help you understand customer behavior, optimize processes and uncover opportunities?

Give your sales reps everything they need to do their jobs—including lead generation, pipeline management, customer history, social connections, document management and more—all in one place. A cohesive CRM solution embedded with user-friendly productivity tools will simplify follow ups and support proactive communication.

Deliver clear, complete information

02 Does your CRM system assist sales team with guided scripts to increase sale values?

An intelligent, event-driven sales process helps new hires and existing team members maximize sales. Interactive, context-sensitive guides provide a clear view of each step the sales rep should take. The system should prompt sales reps to offer add-ons and promotions relevant to the customer's needs.

03 Do role-relevant dashboards deliver the sales metrics that matter most to each person?

Personalized dashboards help the sales team and sales executives work proactively towards taking corrective actions quickly. Tracking and measuring performance in real time, dashboards keep each individual focused on the metrics that drive their success. Company-wide metrics enable the executive leadership team, such as CEO, CFO, CMO and business segment VPs to develop business strategies that adapt to the changing market needs.

Provide insights into your buyers

04 Does your CRM support personalized engagement with prospects and customers?

Buyers expect your systems and people to remember their previous interactions with your organization. Your sales engagement platform should consolidate past marketing and service interactions to provide your customer-facing employees with a contextual view of prospects and customers. With a leading-edge CRM system, you can win over customers with personalized engagement every step of the way.

05 Is social selling and marketing embedded in your CRM system?

Social tools have become a key means of communication for sales, marketing and service teams. Social listening provides insights into customer sentiment to guide service delivery and product development. Social engagement, woven into your CRM interactions, helps your employees build deeper relationships with customers and captures the history of those interactions.

06 Does your CRM system help you understand customer behavior, optimize processes and uncover opportunities?

The data collected through your CRM system holds rich insights that can be applied to improve every aspect of your business. Data analytics and artificial intelligence, working in the background, should enrich every touchpoint of your CRM system. Predictive insights based on customer behavior can drive promotions. Customer insights can help to prioritize leads and opportunities with the highest likelihood to convert and buy.

Offer Intelligent Guidance

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07   Does your CRM system analyze customer calls to improve sales team performance?

Your CRM system can help every seller improve performance by using call intelligence. With prioritized leads and opportunities, sales reps can focus efforts on the opportunities with the highest likelihood to convert and buy. Based on each sales rep's performance, managers can provide coaching based on automatic capture and analysis of sales conversations that reveal customer sentiment and conversation effectiveness.

08   Are you applying intelligent systems to improve customer satisfaction?

Through business intelligence and machine learning, your CRM system can track customer satisfaction and address potential issues proactively. Dashboards can help you visualize customer engagement patterns, sales agent's performance and customer service operations to improve staffing, training and coaching.

Call Center and Field Service

Companies supporting call centers and providing services in the field face unique challenges that only a fully integrated CRM system can support. For call centers, the CRM system should give agents all the information they need to respond to customers quickly—answering questions, solving problems or routing to the right resources. For field service technicians, CRM should equip them with the customer information, tools and guidance to complete calls in the shortest time possible.

Offer Intelligent Guidance

09 Can agents answer questions on order history, inventory availability, shipping and order status from one system?

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10 Does your CRM system guide employees, surfacing information while they are engaging with customers?

Intelligent processes for sales, service and marketing provide guidance on next best steps as well as recommended resources to enrich encounters. In sales, the system can provide product suggestions for cross-sell.
In Service, recommended knowledge base articles can help resolve customer service cases quickly. Predictive analytics and AI (Artificial Intelligence) use historical data to guide agents with best next steps and proactive suggestions.

11 Do you engage with customers via their channel of choice across web, social, chat and mobile?

Customers want options in how they interact with your organization. Your CRM system should allow you to offer customer service through web, social, chat, email, mobile and phone. Through self-service communities and support portals, you can make it easy to find answers. When escalations are requested, CRM system should intelligently route cases from any channel to the right call center agent for quick resolution.

Promote engaging customer service

12 Do defined workflows automatically coordinate activities across departments?

Customers today expect a seamless experience with your organization. With connected data and systems, you can bridge the departmental silos through automated workflows to drive common business processes. Integration with line-of-business applications provides a single source of truth and eliminates double entry. Automation across processes ensures consistent service delivery and enforces standard practices, like approvals.

Support proactive field service

13 Does your CRM system automate scheduling to optimize resource use?

As your organization grows, scheduling becomes more complicated. Your CRM system should help you maximize service technician utilization by automatically scheduling the service technician with the right job skills and best location. When dispatchers manage resource assignments, they should have full visibility across work orders, service technician skills, parts on board, and more to optimize resource usage.

14 Do service technicians have the parts and product information they need to complete tasks on the first call?

Service technicians cannot fix the problem on the first call without the right parts. Your CRM system should synchronize and track inventory down to the truck level. Service technicians should have full visibility into customer preferences and history with personalized step-by-step instructions to reliably track and complete the task at hand—no matter where their work takes them.

15 Do customers receive voice or text service call schedule reminders?

To create effortless customer experiences, your CRM system should make it easy for customers to keep track of service activities and self-schedule appointments through a customer portal. Updates with real-time service technician's location tracking and automated voice and text appointment reminders provide an enhanced level of service.

Achieve More with AHA Apps

Consumer-centricity is our core value and a guiding principle in everything we do. Our passion is to help your company uncover issues and opportunities related to customer experience and assist you in building sustainable relationships with your prospects and customers. We do so by leveraging industry-leading CRM solutions to create a positive customer experience that builds trust and drives customer brand loyalty, engagement, and profits.

Improve Sales and Service productivity and profits

Our mission is to deliver your "Aha" moments through the effective use of CRM solutions for the digital age. We'll help you connect with prospects and customers to improve Sales and Service delivery through:

› **People:** Consumerism is deeply rooted in our culture and DNA. Our people are empathetic to consumer needs, skilled communicators, passionate problem solvers and trained to adapt to any customer environment.
› **Process:** We believe optimizing a bad process does not make it a good process. We partner with customers in co-creating Aha processes to enhance consumer engagement and satisfaction thereby increasing internal efficiencies, productivity, and accountability.
› **Technology:** Our CRM experience enables us to successfully implement CRM solutions by harnessing best practices and methodologies and exceed customer expectations on budget and timeline.

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