

SALES AND MARKETING PLATFORMS

6 THINGS TO GET RIGHT



McIntyre Agency



Sales and Marketing Platforms: 6 Things to Get Right



Time is money when it comes to business and sales.

When designing the perfect process, support your sales team by putting the most important tasks front and center, and automate the tedious follow-up.

There are several qualities to look for in a customer relationship management software (CRM) and Marketing Automation System.

Here is a look into what you need to evaluate when choosing a platform system and what can trip you up.

It's Too Much Money

CRM software comes with a lot of functions to appeal to a wide spectrum of businesses. But why pay for the functions you do not need or will not use? Worse yet, if you don't use them, they get in the way and clutter the user experience. Ask yourself, does your company need all the bells and whistles?

By looking at the functions you need and do not need you can save yourself a hefty CRM expense and focus on the features and functionality your business needs. This will keep the expense down, make it simple to use and help you find a CRM that fits within your budget.

Once it is in place, you can always upgrade as your business process develops and your revenue increases.



Too Complicated

One of the most crucial criteria of choosing a CRM system is ease of use. Does it feel overwhelming or simple when you use it. Does it help? Is it intuitive? Or does it irritate you and slow you down? If it is the latter, then it will fall into the it's too complicated problem. Simple is almost always better.

The solution is to find one that gives the best user experience for your team. Look at how many clicks it takes to perform a specific task. When grading a sales or marketing platform check out the ease of use. This will keep you from having to force it on your team, or worse, paying for something that no one uses.

Lack of Support - Implementation

When researching the CRM company ask them if they offer training, whether that is videos or live workshops on how best to work with the software.

Once you decided on the CRM platform, it is important to implement it within your strategy and system. Not having it setup means that the success will not come, and it will be a wasted expenditure. Set your system and training for success.

No One Uses It

When looking into a CRM, see if its easily adaptable to your sales and training processes. A CRM system should complement your business and reflect your sales process, marketing strategy, customer service, and management routines. Which means once it's configured, it will be easy to use because the processes it includes will already be familiar to your team.



Training is one of the most important factors of a smooth adoption. Use a more intense startup training followed by short, targeted ongoing and hands-on experiential training so that everyone knows how to use it. Most of the time, the real reason people don't adopt a sales automation system is that they don't know how to use it, and it takes too long to figure it out. It goes back to the user experience, if you don't understand how to navigate, how can you use it.

Lack of Interaction with Your Current Tools

Next thing to look at when you're looking into a CRM for your business is whether the system integrates with the other applications your team uses in the business process. The purpose of a CRM is to help you streamline business operations.

Your CRM software should seamlessly integrate with accounting software, HR software, website, and web forms, e-commerce platform, and marketing solutions. It takes research, but there are tons of platforms that will integrate with the systems you have in place. Do your due diligence to find the best one for your specific needs.



Flexibility in The Process

A dialed-in sales process and the tools to manage your team and prospects can skyrocket your sales as much as no process or system will tank them. Allow this process to play out over months, not days, and stay flexible. A good sales process is never set in stone. It needs to be revised and adapted regularly, making sure it stays targeted to your customers' changing needs and business goals.

A well-implemented CRM ensures that your team sticks to the process. It automates every sales stage and prompts on what actions to take, when to follow up, send information, and when to start preparing the sales pitch to close the deal. It also means less work for your sales team, which translates to more sales.

Evaluation and Consulting

A business and marketing consulting agency can help you make more informed choices in which tools to use. In addition, the right company can help you best implement a sales platform into your day-to-day operations. If you would like a CRM but not sure where to start, let us help. **Get a more productive and efficient system going so that your team can sell more and take better care of your clients.**

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