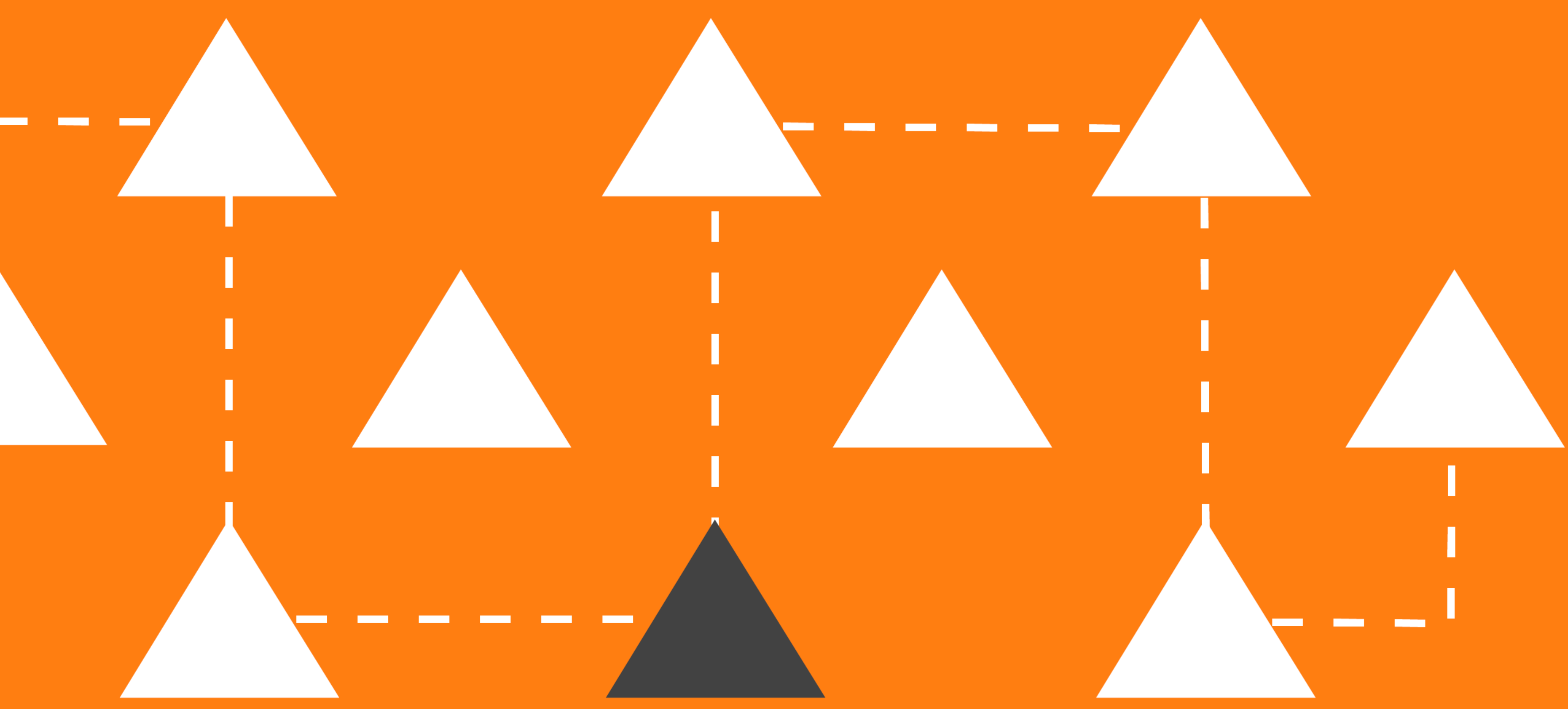
10X more productive series

11 SALES BLIND SPOTS YOU DIDN'T KNOW YOU HAD

Using CRM technology to become 10x more productive



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Introduction

Today's sales professional is a person who is reliable, resourceful and trustworthy in every sales job. A salesperson is a bridge between customer and company, the conduit to a win-win long-term business relationship.

You can be that professional and be even more competitive in today's sales market if, along with your great attitude and proven experience, you use technology to better serve your customers' needs.

By employing customer relationship management (CRM) software, you will never be taken by surprise or left behind on the sales field. No more blind spots from inaccurate or out-of-date information. No more "gotchas" that steal money from your bottom line. In short, you can avoid most or all of those worst-case scenarios that keep you awake nights and hurt your most important asset—your motivation.

This ebook will show you how keeping current with customer requirements will improve your sales, increase your status in the company, and help you rest easy at the end of the day. You'll have the confidence of knowing you've met or exceeded expectations from your entire business community.

Here are 11 blind spots that can surprise reps in the sales process, and how you can use CRM technology to gain the upper hand.

1

Not buying into your tools

Sometimes you'll be faced with decisions from above that don't exactly inspire enthusiasm. Your boss comes in and says, "We've decided to implement CRM and you'll be using this tool from now on."

Talk about a buzzkill! You have all these tasks to do, and now corporate wants to impose a new piece of software that you'll have to spend time learning? It's hard enough filling in travel logs and expense reports.

The key is to remember that CRM is a tool and not a taskmaster. You can make it your own. Spend just a little time playing with the software, and you'll discover cool features that really will make your work easier. Approaching a new tool with the right attitude can make all the difference between that CRM looking like a waste of time or looking like a path to business excellence.

Yes, CRM is something your sales manager will thoroughly inspect, as will the marketing team and even C-level leaders. Just remember, they're looking to gain perspective on your company, not digging for a way to criticize you. If you use your CRM appropriately, they get the info they want, and you have a personal assistant to make sure you always look your best. Capturing new sales leads alone will add significantly to your sales commissions.

2

Losing contacts, losing potential deals

Ever been to a trade show? You know that it's easy to gather business cards. You might even jot down a code or note on hot new prospects. Then you slip that card in your pocket or wallet, yet when you get home, like magic, the card has disappeared.

Or you might meet someone on a chance encounter. You like this person and they seem to have great prospect potential, a business relationship to nurture. But when you go to put their information down in your sales notebook, you find the details you scribbled on that cocktail napkin unusable. The ink smeared and another sales opportunity is lost.

"In real estate," said Ed Hickok, realtor with Keller Williams, "your job is lead generation. I keep 300 current contacts on my list at all times if I want to succeed in this business." He said he couldn't afford to lose those leads by not putting them into a system.

The quicker you can enter contact information into a central place, the more secure your knowledge becomes. You also have the ability to see right away where data is lacking, because fields are left blank. Instantly, you can make a plan for the next call just by knowing what information you need to gather. If you happen to be in the field, you can enter this information using a mobile CRM tool. That way, you can even catch a prospect’s full information before you leave your engagement.

3

Accidentally over- and under-selling

A primary focus of every sales professional is knowing where in the sales cycle a lead resides. Lots of pros will try to keep this in their heads, but information this valuable is best not left to chance.

Imagine Bill Smith and Will Smyth work for two different companies, at two different places in the cycle. Unfortunately, if either Will or Bill call, it is easy to confuse the two names and lose sales time trying to remember if Will wanted widget A at $500 or widget B at $5,000. That could lead to a huge difference and a potential commission loss if you end up selling the wrong widget at $500. You might lose both sales completely by pushing a mistakenly overpriced solution to the wrong lead and company.

With a good CRM system, while you're on the phone, you can verify which company your lead is calling from, what that company needed in your last conversation, and what you want to accomplish with this current call.

4

Forgetting sales specials

You know you have a customer who wants to buy an additional product from you but is waiting for a sale price. What happens if you're on vacation for the first week of the two-week special? You return to your desk, swamped with return emails and phone calls. It gets to the end of week two and you've forgotten to follow up on that special. Chances are you'll lose that sale, if not the customer too.

With the organization that a good CRM system brings, you'll never miss a special again. You can send yourself reminders, set up appointments with the notes concerning the goals for them, or keep details of the sales special handy to answer any questions that arise.

A strong mobile presence for your CRM can also protect you against this situation. Even if you are on vacation away from your desktop, you'll receive those notifications on your mobile device of choice. That means you can either quickly handle the problem yourself or delegate it to somebody back in the home office.

5

Not responding to prospect queries

With the Internet, more and more customers are weeding out seller prospects by doing most of their pre-sale research online. This means the sales pro has less opportunity for a personal one-to-one sale. Yet, in the real estate industry, for example, a whopping 64% of people asking for information on realtors' websites never receive a response.

"I can't win business without being responsive," said Hickok. "So my CRM contacts me by text and email when someone asks a question on my website. When I get that touch, I pull over if I'm driving or drop what I'm doing to respond." His goal is to answer a person's request for information within ten minutes of receiving the call.

A powerful CRM lets you give your clients that level of attention. It guarantees that a new prospect doesn’t slip through the cracks and puts your customer relationships front and center.

6

Letting your customers feel lost in the crowd

Human nature tells us that if all other things are equal, customers will buy from the person they like the most. Depending on the situation, some customers will buy from the person they like most even in the face of unequal benefits. But if your customers, leads and prospects number in the hundreds, how can you be that special friend who stands out in a customer's mind at buying time?

You need to be in regular, customized contact with your target market. Simple things like thank-you notes and birthday cards are indeed important when sent directly from you, the sales pro. Even a scripted message, if tailored just right for your contact, will create a great lasting impression.

To solve the problem of making each contact feel important, you need a very detailed profile ready when the time is right. This kind of information —spouse's and children's names, hobbies and interests, budgets and product desires—can and should be stored in a way that you can pull up at any time. CRM makes that possible.

7

Leaving the little tasks unfinished

Your sales manager calls and says, "You were supposed to have that proposal on Ms. Brown's desk yesterday. What happened?"

Some people like dancing on the edge, creating excuses instead of closed sales. But leaving a job undone is leaving money on the table. The most important part of a salesperson's job is to deliver what you promise. Most business is closed on trust, and if you let people down on the small tasks, you're dissolving that trust between you and your customer, you and your boss, or your customer and your company.

The solution is to set up a task list that's easy to see and stays in front of you throughout the day. CRM can do that for you. You can even set reminders that pop up on your computer screen, tablet or smartphone, complete with sound notifications. A CRM will make sure you never lose track of an assignment, no matter how small. As a result, you’ll complete your tasks on time and continually earn that necessary trust.

8

Losing opportunities with existing customers

Everyone in sales knows that it costs less—up to five or even ten times less—to sell to existing customers than to sell to new leads. The sales cycle is shorter, there are expanded opportunities for new services or accessory products, and happy customers tell their friends about you.

But if you neglect customers, especially those who won't need to refresh their purchase of your product for a few years, chances are good you'll be starting over by the time you get in touch. Or worse, they'll find new, more attentive sellers and you'll lose them completely.

With CRM, you can implement a customer nurturing program of newsletters, direct mail and other marketing messages from your inside team. You can then set a personal reminder to have a face-to-face contact less frequently, but more productively, as you'll know what information has been sent recently to these golden contacts.

9

Taking the news out of new products

As companies work to keep ahead of competition, new products and services are great opportunities for press releases and blog posts. But often, what's immensely important to you and your team isn't even on the radar of your customer's wish list. A few months go by after a big announcement, and you'll be surprised to find out that your best customer wasn't aware of a product upgrade. That customer may even be looking at a new product line from your competitor that seems to better fit their needs.

But if you are in the habit of checking your CRM system for notices sent and call history, you can see at a glance when it's time to share your great company news with your buying community.

And here's a bonus: When you share your latest with a loyal customer, you're opening an opportunity for a testimonial or case study.

"Sales are all about immediacy these days," said Aaron Kesteloot, Sales Manager for ESoftware Professionals, a software sales and development company in Portland, Oregon. "If you're behind on your customer knowledge, you're out of the game."

10

Forgetting to give back

Customers are the greatest assets any company can have. Balance sheets may even have lines on them to measure goodwill in the business community. While that goodwill will often result in a steady flow of repeatable income from items such as software maintenance, regular dental check-ups, or referrals of new homebuyers from satisfied customers, it is easy to take the best customers for granted. If a long-time customer is not in the active sales cycle, you may be tempted to put that relationship on hold until it’s time to make another purchase.

Good customer relations are developed on a two-way street principle. When you provide customers with great service and help them purchase what’s best for them, those people will come back to you in the future or give your business good word of mouth. But if every time you contact a loyal customer, the purpose of your call is to sell something, you may find these valuable people pulling away.

A good CRM system will help you record not only when you last spoke with your customer, but also what you talked about. Make a habit of recording your calls with important details and you'll know when it's time to call for little other reason than to say, "I'm glad we're working together. How are you?"

11

Poorly managing referrals

Most people like to help. You share a challenge and they step up to meet your needs. All you have to do is ask. This is the case when sales reps are looking for referrals. Happy customers are usually more than willing to pass along a name or contact.

The challenge is that it's difficult to remember who you've contacted for referrals before, and sometimes you can fall into a rut of asking repeatedly of the same customers. The time they spend on the phone with your sales leads are hours they're not being compensated for. Don't risk overreaching on the good nature of a client by wasting their time and yours.

With a CRM system, you can note who you have asked about referrals and review your contact lists to uncover the customers you haven't talked to in a while. You don't need to center the conversation on referrals alone; use it as an opportunity to check in with that client. You may uncover small problems that can be addressed and resolved before they grow into stressful complaints. This can not only save your company a customer, but will help improve operations that make everyone happier and more productive.

12

CRM: Knowledge at your fingertips

These blind spots detail just some of the many reasons why a system to manage customer and deal information is important in supporting your role in sales. There are other key features of good CRMs you'll want to seek out when it comes time to selecting a system. Here is a list that every good sales pro should ask for:

- Call automation, tracking and related tools
- Management of company information and personal contacts
- Lead management
- Easy team collaboration
- Native apps for any mobile devices and platforms
- Email marketing and reporting
- Reporting and analytics
- Task tracking and notifications
- Integration with other popular business applications

13

Base is the next-generation CRM

Base CRM by Future Simple Inc. offers you a powerful set of tools that are easy to use and support your efforts for great salesmanship. Here are a few of the things we think you deserve in keeping business going:

- Create invoices and send emails from within a contact page
- Flexibility to rearrange the order of your custom fields
- Customizable pipeline stages
- Automated and prioritized action items
- Attractive reports to help you assess your performance faster
- Chrome Contact Clipper for capturing leads on Facebook and LinkedIn
- Monthly fee structure for buying only what you need when you need it; you'll never be locked into a restrictive annual contract.

Want to know more? Sign up today for a free 14-day trial or contact us for a personalized sales review to make sure the solution you need is the one you get.

With Base, you're getting the Sales and CRM application your team will actually use, and you won't ever be caught leaving money on the table again.

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