

Podcast Script: Automation (A follow-on to CRM 101)

Welcome to this 60 second Sugar snippet. My name is Susie Williams. Continuing with our discussion on CRM, today we are focusing on another powerful aspect of customer relationship management systems—automation.

Automation takes many forms in a customer relationship management system. We'll talk about four areas of automation: automating manual processes, automating your sales process, building automatic alerts for events or conditions, and using technology to make sure you adhere to compliance regulations.

Automation works well for taking manual, repetitive processes and streamlining them into tasks a computer can do. A great example of this is a marketing campaign. Using automation, your marketing team can identify a target list of prospects, create an email template, and send that message to thousands of eyes all with a few mouse clicks. The campaign can be tracked for results which show up on a graph in the application. What used to take weeks to execute and correlate now takes minutes. With this fast turnaround, you can test your messaging and tune your campaigns for maximum effectiveness.

Turning to the sales area, you may hear sales gurus talking about “automating your sales process”... well, that's a good thing, and one worth pursuing. If you know your business well enough, you know what needs to be done in order to close that sale. Do you need to do a demo first, then write that proposal? Do a “needs analysis” before presenting a solution to the key decision-makers? Do you find that there's a formula for the number of outbound calls you need to make each week to keep your pipeline full? Building these processes into your CRM system in the form of workflows and tasks lets you stick to your proven formula for every sales cycle.

Automation can help you with government compliance issues as well. Due to privacy regulations, you need to provide a mechanism for your email targets to “opt out” of any future correspondence. Using your CRM system, you can mark those targets with an Opt Out flag to automatically exclude them from communications.

Automation can be a scary topic for employees who are used to controlling every step of the process; the key is to understand that you are taking away the boring, repetitive parts and leaving the interesting tasks. Never forget that for most industries, it still takes people to connect to each other to make a sale. Let the computers do the boring tasks and free up your sales and marketing folks to do their magic!

And that's your 60 second Sugar snippet. Goodbye!