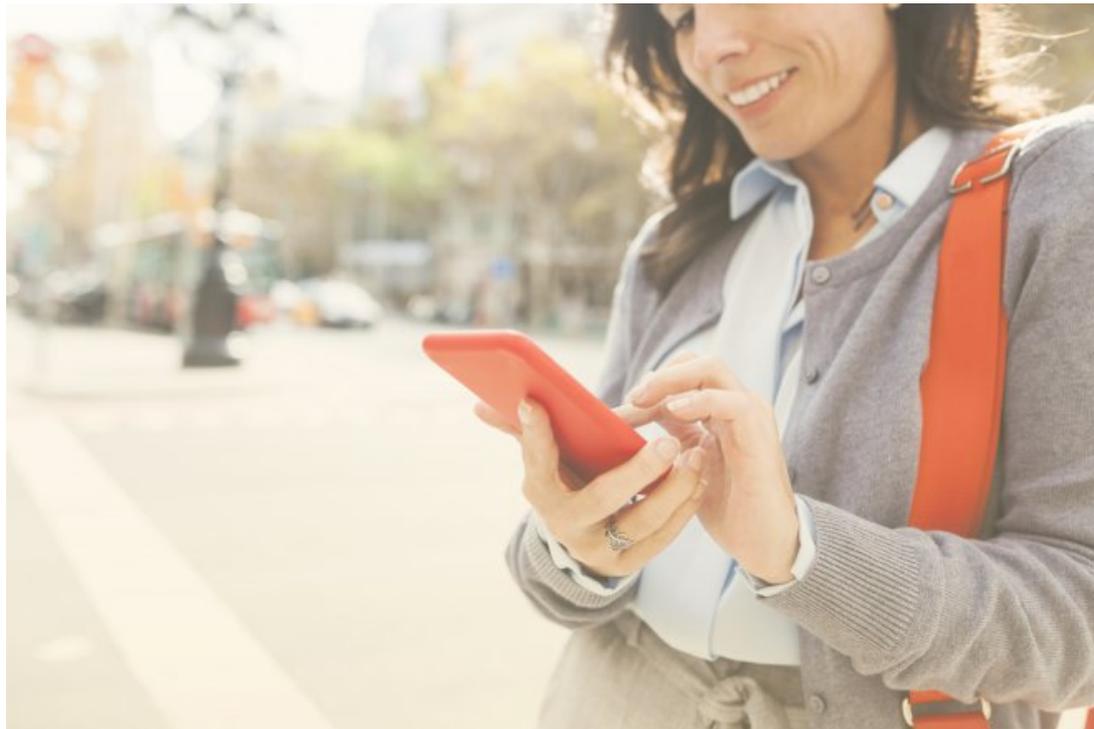


# Why Maximizing CRM Utilization Matters – and How It Can Help Your Business



By **EVAN WADE** - Contributor

Some technologies provide value by helping businesses overcome an industry-specific set of challenges. Others, such as point-of-sale software, meet needs common to many industries or organizations. CRM utilization has taken the biz-tech world by storm because it borrows from both categories, doling out at-a-glance customer info, mineable business intel, data-driven lead sheets, and more. This kind of utility shortens sales cycles and improves the customer experience.



The first step to improving your customer and employee experience is maximizing your CRM utilization.

Some businesses use the medium better than others, however, and the difference between success and failure often comes down to the ability to integrate. Because CRMs are tightly connected to the processes that make an organization tick, leading solutions, such as Salesforce and Zoho, must work closely with the tools that uphold the user's day-to-day operations. If collaborating departments don't maximize CRM utilization, they miss out on key benefits.



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## What Is a CRM and Why Does Utilization Matter?

Working with a "stock" CRM has become an antiquated practice. In the legal industry, for instance, 77% of firms have integrated a CRM into their daily practices, and a growing percentage are using CRM "add-ons, enhancements, and augmentations," according to JD Supra. This kind of change doesn't occur in a vacuum, and it speaks to a business world that has fully embraced CRM as an ingrained part of the larger process.

So what are the benefits of a CRM? With maximized CRM utilization, businesses can see big benefits fast. Consider a company that has a CRM but still manually logs calls and call details to customer accounts. They punch the customer's number in, verify the customer's identity, note the exact time the call started/ended, and then, finally, note the reason for the call. When the same CRM is integrated with a unified communications (UC) solution, everything except verification and final noting is automated by the system.

The same communications solution centralizes all the customer's contact, across channels. They can send a Facebook message regarding an issue they're having, follow up with an SMS message, and call several days later without their phone rep losing context. It's all automated, with reps benefitting from a centralized display of customer info dating back to the beginning of the relationship. The same communication tools might also allow support reps to place a requested video call to a flummoxed customer, or record the technical aspects of a call as the client describes them for easy transmission to a higher tier of support. It makes employees more productive and customers happier.

*To get the most out of the chosen tool and the personnel using it, integration with existing systems and processes is crucial – and what better place to start than with the very tools employees are already using?*

## Beyond Support

Customer support situations aren't the only business-customer interactions that can benefit from CRM. The average sales department contains countless more examples of effective CRM utilization, thanks to their direct contact with clients and need for specialized knowledge about them. Imagine all the info in a full Rolodex, only organized, centralized, and shared across an organization.

CRM's lead-tracking and -management only get better with the right communication and collaboration tools in place. Let's say a company's leads are tracked via inbound calls that potential customers have made in the past. With a communications solution that integrates contextual information, the list of potential callback targets grows even stronger. Profiles generated for each possible lead contain every contact method (phone, email, SMS, etc.) and a detailed history of each interaction, giving the rep information about how the customer prefers to communicate, helping build customer loyalty instantly.

Sales reps also tend to be mobile and dependent on multiple communication formats. With modern UC tools, carrying a number between devices is as easy as making a call. The rep tracking leads above can access the same information, transcribed to the same profile, and then call the prospect from their phone whether they're at the office or working from home. The rep can enjoy the enhanced mobility of a UC solution and benefit from context-sensitive customer information prior to the call. The company's CRM utilization is built to drive greater productivity, boost existing processes, and ultimately increase the bottom line.

## CRM Utilization Matters

There's no doubt that implementing a CRM can be a major change for any organization. Big as it is, though, trends in business show it's still just a first step. To harness the advantages of a CRM and get the most out of the personnel using it, integration with existing systems and processes is crucial — and what better place to start than with the very tools employees are already using?