

# Five smart CRM customisation tips to drive in more business



By [Paul Anderson](#)

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The past few years have seen heavy automation of customer relationship management system. Both small and big companies have invested in customer relationship management (CRM) software implementation with a promise to offer better and personalised customer services.

Undoubtedly, this has helped them in lowering the cost of customer management but they are still far from reaping optimum benefits from their automated customer management application. This is one of the major reasons why companies complain about higher cost of automation. As we have ushered in a new year with new hopes let us discuss about some smart *CRM customisation* options that can improve the ROI on your customer management software.

## 1. Integrate social media

Social media CRM or SCRM is going to be the buzzword of corporate world this year. Around 2/3 of the American population is active on the social networking sites - discussing about products, services, insolent representatives, great experiences, branding campaigns, and more. This offers a huge repository of information for companies to monitor the changing behaviour of customers.

The robust trends shown by social networking sites in shaping public opinion on matters of importance have forced companies to take 'mentions' and 'posts' on social sites seriously. Companies are now taking special interest in social media marketing and social media optimisation and have made these parts of their branding process. You can turn your customer management software into a platform that will facilitate a two-way communication and bring your workforce and customers together.

Although some earlier versions of social media CRMs were expensive but now many customer management software providers are offering targeted *small business CRM* versions for small enterprises that can't make large investments towards automation.

## 2. Synchronise platforms

For years CRM has actually automated the customer dealing process - often leaving customers to navigate through the answering systems. Customers like to be taken care of personally and so, if they are made to fumble with keys and instructions you may run a risk to lose them in the long run. Noting irks a customer more when they are required to reiterate their stories multiple times. Integrating the customer service interface directly to customer complaint platform will help improving customer experience.

You can also develop an efficient self-help platform where the customers can get succinct and clear instructions on how to solve simple problems themselves. This will also help reducing pressure from your over burdened customer service representatives.

## 3. Streamline information

You may consider removing old and outdated data from your CRM to improve its efficiency. Often we have found sales and customer service representatives reciting information about customers that is outdated. This can make your customers feel that you aren't actually as personal as you're trying to be. This can result in distancing your customers

from you. Make sure that all data about your customers are updated like - if they have got married, had first child, or moved to another location. Similarly, you must also consider removing wrong and duplicate entries from the software to make it more efficient.

## 4. Go mobile

Customers like convenience and hence, having your CRM available on mobile and other handheld devices will help improving customer experience. Similarly, this will also allow your marketing executives on the move to receive real-time feed of deals and sales. Cloud computing have made it possible to have software applications hosted in remote servers from where those can be accessed from any part of the world.

## 5. Plan marketing campaigns well

Timely and well planned marketing campaigns are invaluable for your business success. Most customer relationship management software now have integrated marketing tools which let you send mails, newsletters, promos and discount details to your customers. When these are useful integrations to have you must not bombard your customers with hundreds of such mails every day. You need to decide on the right pace to send mailers to your clients or else you may drive them off.

It only needs smart thinking to bring in changes. The above mentioned tips do not involve additional investment. However, you can leverage your customer service management system by integrating them to your business philosophy.

## ABOUT PAUL ANDERSON

Paul Anderson is a software consultant based out in California. For over five years he has been offering CRM consultation services to a wide market. Paul is currently associated with Corelynx Inc., also a California based company, which offers wide range of software solutions to customers that includes cloud computing, applications development, open source software development and more. Follow him on Twitter at @pauland29268750.

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