The secrets of B2B CRM for small businesses

By Simone Tal

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Customer management, loyalty and retention are concepts deeply ingrained in successful organisations, which does not mean the process has to be complex or costly. By building an understanding with clients, you will be able to strengthen relationships and boost loyalty.

In this excerpt from her presentation at the recent Loyalty and Rewards Conference, Brand Manager at Demographica Simone Tal explains how small to medium-sized organisations can deliver B2B love without breaking the budget.

The departure point for any CRM process is recognising that it is going to differ from company to company and is dependent on many factors - from the type of business, its environment and market, through to what we term the Client Lifecycle.

By building this understanding of clients, their needs, fears and motivations you can start identifying actions that you can take to strengthen your relations, and thereby build rapport and loyalty.

It is important to recognise that this is very much a process, and not one that can be completed overnight, nor one that should be static. It is imperative to adapt the client strategy as customer needs and environments change in order to stay relevant and effective.

This ongoing process is one that we employ at Demographica in which we combine our years of experience together with behaviour analysis and regular feedback from our sales team to ensure we're still on track.

While this next concept may seem counter-intuitive, you should strive to build a picture of the Client Lifecycle even before someone is signed as a client. This is crucial to the success of your customer strategy because all too often companies find they're good at acquiring a client, but not always sure what to do once they've signed them up.

If you have a clear idea what the Client Lifecycle is, you're far better able to create the necessary touch-points through that lifecycle.

One of the methodologies used by Demographica when pursuing a prospect is to provide them with an introductory pack even before the first sales meeting. This allows prospects to get a feeling for our brand, values and services long before we start the sales conversation and it is a great icebreaker for that first meeting.

By setting clear objectives for our interactions and client touch-points, we know exactly what we want to achieve throughout the Client Lifecycle. By knowing what those objectives are, we can then adapt our strategy when things start to change in the client's environment, without having to rethink the whole strategy.

For example, apart from the pre-meeting sales pack, we present a welcome pack when a client signs with us so that they know we appreciate the opportunity to work with them. We have yet another pack for when clients become less responsive or active. In these cases, we deliver a pack with a more tongue-in-cheek approach that lets them know we still value them and that we haven't forgotten about them.

We also undertake regular interactions with existing clients to retain that contact and open communication to show our appreciation.

In summary, the three key things that any B2B customer strategy should entail are a deep understanding of your clients; flexibility and adaptability of approach; and recognition that there are no rules on what is right and what is not. Every business, industry and individual client is different and deserves a plan that suits the situation, not one that is used in template format and applied in all instances regardless.

Implied in this approach is also the recognition that if something is not working, shut it down.

ABOUT SIMONE TAL

Simone Tal is the Brand Manager for Demographica, South Africa's leading digital direct marketing company. Demographica's goal is to provide companies with a results-driven advertising solution by directly communicating with targeted consumers via email and SMS. Simone is responsible for all marketing and brand management, including media communication and event management. She also runs Demographica's social media accounts and assists the sales team with creating the collateral they need to effectively communicate with potential clients.
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