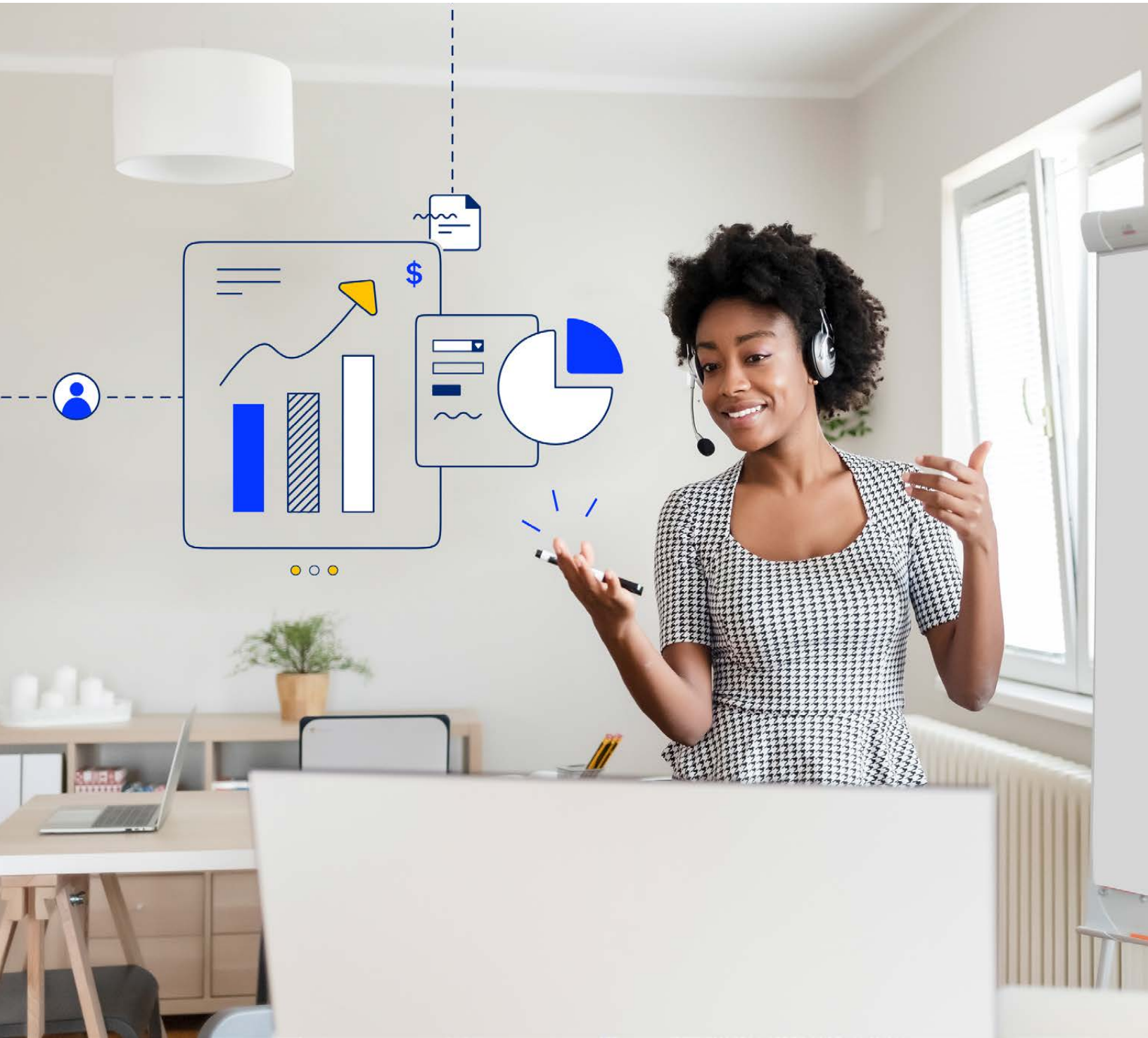


# How **modern CRMs** are tackling the top 5 marketing pain points





# INTRODUCTION

**For sales and marketing leaders operating in today's hyper-competitive world, their CRM system could be the difference between success and failure.** A good CRM should help them bring more leads into nurture streams and convert them faster. An excellent CRM can help them deliver the personalized services that consumers now expect and provide the superior experiences that will keep their customers loyal.

Over 90% of companies with over ten people have a CRM system, so there's a good chance that as an attentive professional in an enterprise-level organization, you are familiar with the benefits your software should be delivering. However, the economic turbulence of the last few years has accelerated the digitization of customer-facing processes, data privacy laws are in constant flux and tools such as AI are helping to re-imagine the value that CRM can deliver to your organization. Can you be sure that your CRM system is keeping up with these changes?

This eBook highlights five tell-tale signs that it might be time to shake up your software selection – and how a leading-edge CRM system can help.

## Tip 1



# Salespeople overburdened with 'admin'

If a CRM system only gets updated at the end of the month, it's a sure sign that the sales team is struggling to enter the data. It may be that the sales team struggles to understand, "What's in it for me?". They may regard the CRM as a management reporting mechanism, rather than a critical tool that will help them do their job more effectively.

This means that you are not working with the most up-to-date version of your customer data – hampering the effectiveness of your marketing efforts and making sales reporting a 'guesstimate' rather than a reliable forecast.

- + Your CRM system should be designed around your sales process, rather than your sales processes having adapted to the needs of your CRM system. Typically, a salesperson will spend several hours a week updating their sales records, so the easier and more intuitive you can make this process, the more time is freed up for engaging with customers.

[A modular, customizable CRM system should enable you to design for your own unique workflows; and a portal approach should enable salespeople to have speedy access to the data that they need.](#)



"Through Zoho CRM I easily manage enquiries and quotations because I remain up to date with its data synchronization, so I am better at handling the sales pipeline."

**Rebecca Davies, Manager Accounting Compliance & Reporting,  
Ernst & Young**

## Tip 2



# Your systems struggle to adapt to changing circumstances

For years, economic uncertainty has been a certainty – and it's been a perfect storm of sorts for sales and marketing leaders. Volatile trading circumstances – supply chain issues, inflation, the energy crisis – continue to put strain on businesses. There is an evolving media landscape with new channels (e.g. TikTok, connected TV) achieving mainstream status.

There is also huge focus on privacy, with Google embracing a 'cookieless world' and GDPR (the EU's General Data Protection Regulation) and CCPA (the Californian Consumer Protection Act) are driving regulatory change worldwide. Against this backdrop, there is constant demand to update CRM systems – a demand that many companies are finding hard to address.

- + A modular CRM will be able to provide you with software 'Lego bricks' that you can use to re-design your system in response to the changes described above. With this approach, the majority of the functionality you need has already been built into the system (and new modules are released as circumstances change), so you merely need to select what you need, define your workflows – and you're ready to go.

Also, many CRM vendors are embracing a Low Code/No Code (LCNC) approach to application development. This employs a graphical, icon-driven 'drag and drop' approach with the coding handled automatically in the background. This means that people with no coding expertise can make necessary changes to the CRM system – eliminating reliance on scarce and expensive professional programmers to update your system.



## No unified access to customer data

Today, the customer experience is as important a differentiator for a company as product and price. Your customers do not want to be overwhelmed with communications from different parts of your company on the same topic; or to be transferred to multiple agents during a single call. Equally, a sales rep on a customer call should be able to log a service issue without having to wade through different log-ins.

Just as importantly, data privacy pressures are dictating that you can no longer rely on third party data bought from intermediaries to provide the intelligence for your marketing campaigns. Instead, you need to unite all the first party data that you have gathered from direct interactions with customers. If this critical data is contained in siloes around your organization, then your sales effectiveness is hugely compromised.

- + Many CRM systems are 'Frankenstein's Monsters', constructed from a series of acquisitions over many years. Creating simplicity from this complexity is often difficult – there is no value in trying to eliminate the siloes in your own organization if you are required to mimic the siloes of your software vendor.

[Look for a CRM vendor with a platform created organically and on a single code base: this makes for seamless integration between different modules and will help to ensure the seamless access to data that you seek.](#)



## Low customer retention

For any company, existing customers are always the lowest hanging fruit; and it is likely that a small number of customers are contributing the lion's share of your revenues. It's also true that retaining existing customers is many times cheaper than acquiring new ones. Customers also expect companies to address their needs on an individual level – around two thirds of consumers now expect personalized offers from the vendors that do business with them.

But how can you identify which customers are making the biggest contribution? How can you determine whether these customers are unhappy and likely to turn away? And how can you deliver personalization at scale? Your CRM should provide you with the intelligence you need to keep your customers satisfied.

- + Your CRM system should identify high value customers and target them for greater and more personal attention. Equally, it should also flag up when engagement drops – a strong indicator of dissatisfaction – and initiate a series of steps to remedy the situation. It should understand how (and how often) your customers wish to receive communications with you. It should also allow you to easily look at individual customers (or customer segments) and understand their purchase preferences and patterns – and to create and communicate offers accordingly.

Overall, your CRM system should allow you to build up a detailed 360° view of your customers (and as we move into the cookieless world, first party data will be critical) and allow you to maintain an effective relationship with them.



"I can truly say: it solves every problem we tackle. We are a business that lives on 'speed-to-lead'. As such, we've been able to develop a multi-step automation process that processes inbound leads, passes along crucial marketing information at the same time as we are notifying our business development team to reach out. Because of workflow customizations like this, we can compete with companies twice our size with ease."

**Marc Fishman, Director of Sales and Marketing, Call Center Sales Pro**



## The Data Privacy bar has become too high to clear easily

Regulation such as GDPR and CCPA impose stringent guidelines on the use of data – and severe penalties for any data loss (in addition to the reputational damage that a data breach entails).

This is driving change in other jurisdictions.

In addition, consumers are now much more assertive about how their data is being used – a recent survey suggested that this number is now as high as 75% – and they are increasingly alarmed about the aggressive monetization of user data by many large tech vendors.

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- + It is no longer good enough to comply merely with the letter of the law: increasingly companies will be required to live up to the spirit in which the law was created, and to act proactively as guardians of their customers' personal data.

Many CRM vendors actively harvest the data in their customers systems – ostensibly to 'improve the customer journey': However, many use cookies and trackers that extend far beyond what is required to ensure good service delivery. In reality, these tools are being used as the basis for targeted advertising. Increasingly, using customer data in this way will be viewed as unacceptable and may well become illegal, so you should take a close look at the data practices of any prospective CRM vendor.

Some CRM vendors are embracing a 'Privacy by Design' approach in which system enhancements are evaluated for their security implications before even reaching engineering – if they fail to ensure data privacy then these initiatives are halted. Again, this should be one of the criteria used to assess the suitability of your CRM vendor.

And, of course, security is the great enabler of data protection: CRM vendors created through multiple acquisitions have multiple vulnerabilities and the use of public clouds to host systems has resulted in several high-profile data breaches in recent times. A CRM system developed organically and hosted on its own private cloud provides you with stronger assurances that your customers' data will be secure.



# CONCLUSION

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**Your CRM system is the most important enabler for the enhanced experiences that your customers demand. It is how you get the best from your sales and marketing teams. It is how you comply with increasingly stringent data privacy legislation. It is an accelerator for the growth of your business.**

So, choosing a flexible CRM system that allows you to align it with how you do business today – and how you will need to do business in the future – is critical to the overall success for your business. Choose wisely.



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