

CRM – Customer Relationship Management

Implementation Best Practices Case Studies



CRM – Definitions

At its simplest definition, a CRM system allows businesses to manage business relationships and the data and information associated with them. [Salesforce.com](https://www.salesforce.com)

CRM refers to practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers, assisting in customer retention and driving sales growth. [Techtarget.com](https://www.techtarget.com)

The other main functions of a CRM software include recording various customer interactions (over email, phone calls, social media or other channels), [automating](#) various workflow processes such as tasks, calendars and alerts, and giving managers the ability to track performance and productivity based on information logged within the system. [Soffront.com](https://www.soffront.com)



CRM – Customer Relationship Management

A must have tool allowing visibility into your sales staff productivity, customer engagement and predictive analytics.



CRM – Stats

1 - CRM returns an average of \$8.71 for every \$1 spent – what an awesome ROI percentage! Companies are continuously making new investments in the CRM platforms.

2 - A CRM can increase revenue by a whopping 41% per sales person!!!

[According to Nucleus Research](#)



CRM Benefits - Sales People

- Managing your sales funnel
 - How many customers we actively working
 - Where are they in the sales/buying process
 - Scheduling next actions and tasks for follow-up
 - Keeps hot prospects top of mind
 - Forecasting performance
 - Email Integration



EMAIL
INTEGRATION



CRM Benefits – For managers

- More effective and efficient sales meetings
 - Identify current month deliveries more easily
 - Measure salesperson activity and productivity
 - Measure closing ratio
 - Performance management
 - Forecast future sales and deliveries more accurately – Predictive Analytics



CRM Benefits – Other.

- **Measuring Marketing Effectiveness**
 - **Lead Sources**
 - What's working
 - What's not working
- **Data Mining**
 - **Automated Re-Marketing to previous customers with new conversion offers**
- **Service**
 - **Automated E-mail and direct mail marketing for service reminders and offers**



CRM – Setup

Customize for Mobility

- Build comprehensive Customer profile
 - Nature of disability
 - Mobility device
 - Driver vs passenger
 - Veteran or not
 - Accessible Van or equipment
 - Customer dimensions

Add new person [X]

Owner
Aaron Gardner (you)

Address
[]

Person Type
[]

Person With Disability
(none)

Type of disability
(none)

Type of Mobility Device
(none)

Mobility Device Make and Model
[]

Client height in Device
[]

Client length in device
[]

Width of device wheels
[]

Width of device armrests
[]

Veteran
(none)

Lead Source
(none)

Entire company [] Save

Product of interest

(none)

(none)

New Lowered Floor Minivan

Used Lowered Floor Minivan

Used/New - CPO Lowered floor Minivan

Modifications to personal auto

Commercial Van

Full Size van

Additional Equipment

None

Retractable Tie-Down belts

Hand Controls

Steering Knob/Orthotic

Transfer Base (B&D)

Auto Lockdown (QLK - EZlock)

Secondary controls

Reduced/Zero Steering

Reduced/Zero Brakes

Stowage Lift (Bruno/Harmar)

Transfer Seat (Valer/Link)



CRM Setup – Use stages

- Sales Funnel management

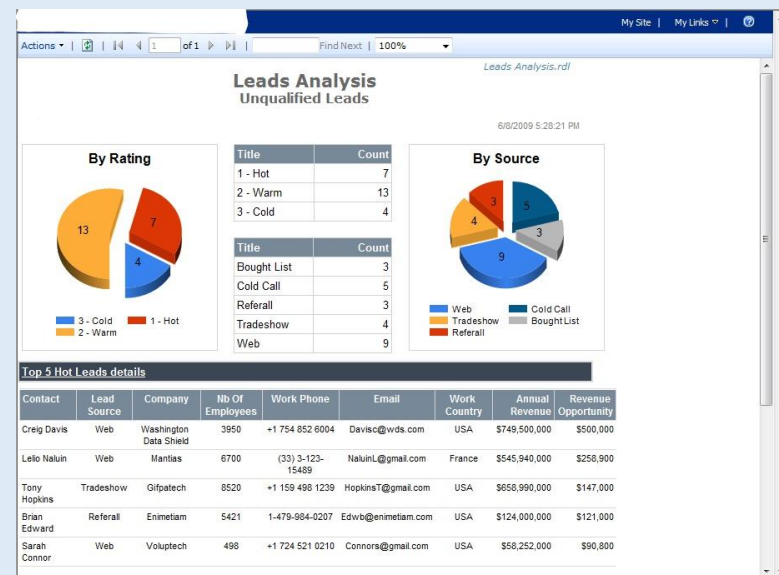
- Lead Status / Stage

- E-lead / Sales Lead
 - Open
 - Closed
 - Quoted
 - delivered



CRM Setup – Data Fields

- Setup data fields for information you want to use and report on later
 - Examples
 - Lead Source
 - Veteran Info
 - Disability Info
 - Vehicle information
 - Conversion information
 - Mobility Equipment information



Choosing a CRM

- Sample of CRM and DMS Products
 - Goldmine
 - Act
 - Salesforce
 - Dealerteam
 - Dealer Socket
 - Pipedrive
 - Avonbrook - Fortuna

Choosing a CRM

- What's Your Objective
 - Sales Management Only – Standalone CRM
 - Paperwork Automation
 - Full Dealer management System (DMS)
 - All Inclusive
 - CRM
 - Quotes and invoice
 - Service – Repair orders
 - Accounting

Quotation

Job Number:	
Address:	
Quoted by:	
Website:	

COMPANY NAME ADDRESS CITY, STATE, ZIP Phone: 000-000-0000 Fax: 000-000-0000	SERVICE ORDER		
<input type="checkbox"/> SERVICE <input type="checkbox"/> INSTALL	<input type="checkbox"/> PICKUP <input type="checkbox"/> DELIVERY	REPAIR IN <input type="checkbox"/> HOME <input type="checkbox"/> SHOP	DATE ORDERED / /
			<input type="checkbox"/> C.O.D. <input type="checkbox"/> CHARGE
			Phone _____

Purchase Agreement

The undersigned (herein "Purchaser") hereby offers to purchase from the owner (herein "S
estate located at _____ in the city of _____
of _____, State of _____, the legal description
is: _____



Choosing a CRM or DMS

- Sample Of Stand Alone CRM Products

- Goldmine
- Act
- Salesforce
- Dealer Socket
- Pipedrive
- Dealer Express*

- Sample Of Full DMS Products (CRM, service, quotes, purchase agreements, parts, accounting integration)

- DealerTeam
- Fortuna by Avonbrook



pipedrive



DealerSocket



DEALERTEAM
AUTOMOTIVE
DEALERSHIP
PLATFORM



FORTUNA
THE NEXT GENERATION IN
DEALER MANAGEMENT
SYSTEMS



Case Studies

- Mobility Transportation Systems
 - Alison Weber

- Bussani Mobility
 - Dan Bussani



Case Study Questions

Questions for both

1. How long have you been in the mobility business, how long have you been using a CRM and what CRM product are you using?
2. What was your major motivation for implementing a CRM? Was there an Ah-Ha moment?
3. What kept you from implementing a CRM sooner?
4. What was your biggest challenge during implementation.
5. If you had to do it again is there anything you would have done differently

Alison

1. You have only been using Pipedrive CRM for about 10 month, what impact has it had on your business so far? What feature stand out the most as a management benefit?

Dan

1. You have been using Dealer Socket for a while now, what made you decide to move to a full DMS product?

Q&A From the Audience







**THANK
YOU**