StormSPACE

6 Steps to set up a CRM System for Success

Save time
Boost productivity
Work more efficiently

CRM set up can seem daunting, but when done correctly will result in an extremely powerful tool that's tailored to your business and works for you.

You won't have to ask these questions anymore:

- "Where did this lead come from?"
- "What are they interested in? Are they interested?"
- "Did I follow up yet?"
- "Are they a good fit?"
- "Should I call them? Do we have their number?"

You will spend less time searching and more time developing new business and selling. You will stop asking yourself what you should do and start doing what you need to.

Here's a 6-step process that will teach you how to set up a CRM system:

1. Map Your Customer Journey
2. Streamline Your Processes
3. Create Custom Fields, Labels and Pipelines
4. Migrate Your Lead, Prospect & Customer Data
5. Integrate your tools and automate manual processes
6. Add users and set permissions

STEP ONE

Map Your Customer Journey

How do your customers become your customers?

How you setup your CRM strategy depends on what you need your CRM to do for you. What you need your CRM to do for you depends on how your business gets customers.

To create new business, there are 3 key questions you need to answer:

• How do people find out about you?
• How do you know when they're ready to buy?
• How do you close deals?

When you understand how you find and sell to customers, you'll naturally spot things a CRM solution can help with. The result? A tool that takes care of the management headache that is keeping track of every lead and customer.

STEP TWO

Streamline Your Marketing, Business Development & Sales Processes

Do you have a "Game Plan" for your business?

Once you've answered your key business/marketing questions, all you have to do is go through them one at a time and there you have your business processes and the information you'll use your CRM to manage.

What does this look like?

• **How do potential customers find out about you?**
Mostly through LinkedIn and other social platforms. We've run a few Campaigns with moderate success, our organic growth on the business pages has been really solid.

• **How do you know?**
Current customers came to us through LinkedIn and other platforms. Whether it was direct interaction or coming to our website from their page, LinkedIn has been our biggest source of lead generation.

• **What customer actions usually happen before they move to the next stage ie becoming a warm lead?**
They usually sign up for our newsletter, attend a webinar or request a discovery call they must provide contact details.

- **What customer actions need to happen before they move to the next stage I,e become a prospect?**
  We need to follow up with them personally and arrange an f2f call or meeting to determine their requirements and learn more about them and their business.

- **What customer actions need to happen before they become a new client?**
  After successful follow up activity and meetings, we will fully understand their needs, have presented a proposal, negotiated and closed the deal.

Create and define a process that is centered around generating interested prospects from LinkedIn and create your call to action. You can also direct them to your website where they can sign up to learn more or receive content.

Ensure the contact form on your website collects contact information and adds each contact to your CRM pipelines through automation!

STEP THREE

Create Custom Fields, Labels, Stages and Pipelines

Take that CRM and get ready to make it your own.

What are custom fields, labels, stages and pipelines?

- Custom fields are a means for keeping all your contact information organised and up to date.
- Labels segment your contacts into what they are looking to buy and where they sit in your sales funnel.
- Stages are the steps in your pipeline which allow you to see where opportunities sit in the sales process.
- Pipelines highlight the value of your deals systematically drive your opportunities to conversion.

Make your processes as simple as possible. Over-complicating these areas with too many options leads to confusion.

Once your processes are reflected in your CRM it's time to think about what customer information you need.

STEP FOUR

Migrate Your Lead, Prospect and Customer Data

First things first, make sure the data you are importing is clean, no point in using outdated information. Taking time to cleanse your data is worth it in the long run.

It's important to map out your custom fields before you put your information into a new CRM. You'll also want to map out the pipelines that your leads and prospects go into.

You can import contacts with a .csv or excel file. This makes it possible for you to import segmented groups of your contact list at the same time. That lets you 'tag' contacts as they come in, so you don't have to sift through your list and manually tag them later.

Automations can translate your lead generation process into CRM actions!

Once you migrate your customer information, you can set up your other tools and automations.

STEP FIVE

Integrate Tools and Automate Processes

What information do you gather from outside sources?

- Email sync
- Calendar appointments
- New contacts / referrals
- Social media interactions
- Webinar attendance
- LinkedIn connections
- Membership signups
- Website tracking

How do you get that information into your CRM? Integrations!

There are three main methods of integrating other tools with your CRM. The capabilities of your CRM will determine which one you use.

1. Direct Integrations – connections that have been built by the creators of the CRM, or creators of the other tool. These can be used right from the platform.

2. 3rd Party or Middleware Integrations – connections made using a middleman. The middleware acts as a bridge connecting the two tools that otherwise wouldn't be able to communicate.

3. Application Programming Interface (API) Integrations – connections made custom by using the code of the platform. These integrations can be the most specialized, but also require specialized technical knowledge.

Every CRM is different, and has different capabilities when it comes to integrations. When choosing a CRM make sure that the integrations you're looking for are possible.

Once your integrations and automations are configured correctly, you'll want to make sure that they stay that way. Especially after you add other team members to your CRM system.

STEP SIX

Add Users and Set Permissions

Open your CRM up to your team so they can access the system and have their calls and emails added automatically.

Set up permissions to grant access in some areas, but restrict access to others. Think about each user's role and what is needed.

- **Marketing** should have access to email automations and subscription forms, but probably won't need access to pipelines.

- **Business Development/Sales** will need access to their pipelines, but shouldn't be messing with the marketing automations that nurture their leads.

- **Support/Admin** will want to view contact information to help them resolve issues but won't benefit from accessing your integrations.

Giving too many people access to your CRM can lead to bad data and confusion. Set clear guidelines for who has access to what data to keep a tight running ship.