



PURPLEGROWTH
COURSES



MANAGING CUSTOMER SERVICE, SALES & MARKETING.



By Hope Dlamini



INDEX

WELCOME TO MODULE 4: CUSTOMER RELATIONS MANAGEMENT (CRM), SALES & MARKETING



Introduction to Customer Relations Management (CRM)



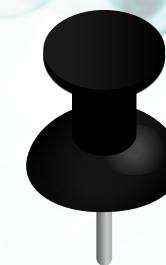
Customer Relations Management Models



Customer Experience Management.



Managing Customer Service



Building relationships for successful sales



INDEX

WELCOME TO MODULE 4: CUSTOMER RELATIONS MANAGEMENT (CRM), SALES & MARKETING



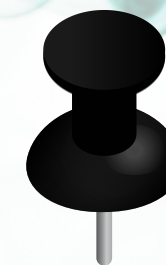
Professional behaviour and
client relations



Managing Customer
Satisfaction & queries



Management of client
interactions



Basics of Communication,
ethics and conduct.





◀◀◀ Demonstrate an understanding of the terms and benefits of CRM on a company's bottom line.

◀◀◀ Analyze the different components of a CRM models

◀◀◀ Describe how CRM creates value for organizations and customers.

◀◀◀ Understand what a customer service approach is and know how to provide excellent customer service

◀◀◀ Identify ways to establish links between excellence in customer service and your business practices and policies

◀◀◀ Develop the skills and practices that are essential elements of a customer service focused manager.

**MODULE LEARNING
OUTCOMES : CRM**



Discover the benefits of developing a support network of connections

Understand how building relationships can help you develop your business base.

Understand the importance of expanding your client base through effective prospecting.

Learn how to use a prospecting system to make you more successful. And develop, refine, and execute the art of cold calling.

Apply your knowledge of body language to improve communication. Understand the impact of space in a conversation

Explain and apply concepts of customer focused selling.

Understand productivity techniques to maximize your use of time.



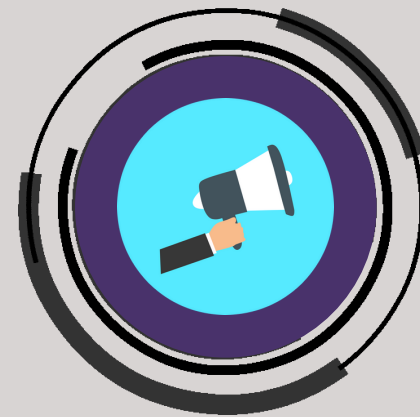
**MODULE LEARNING
OUTCOMES : SALES**



MODULE LEARNING OUTCOMES : MARKETING



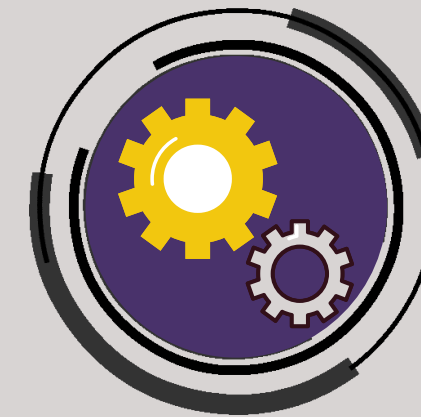
Basics of
telemarketing



Know how to
develop a
marketing plan
and a marketing
campaign



Concepts and
types of
Marketing



Apply tools and
strategy to create a
marketing plan
that supports the
growth of your
small business



Leverage the
best of Internet
and social
media
marketing

SECTION 1: INTRODUCTION TO CRM CONCEPTS

This section focuses on key concepts relating to Customer Relations Management.





OVERVIEW: CUSTOMER RELATIONS MANAGEMENT/ CUSTOMER SERVICE

Benefits of CRM

- ✗ CRM enables an organization to provide better customer service.
- ✗ Cross sell products more effectively
- ✗ Simplify marketing and sales processes
- ✗ Discover new customers
- ✗ Increase customer revenues
- ✗ Help sales staff close deals



BASIC CONCEPTS



DEFINITIONS:

Customer

A customer is a person or company that receives, consumes or buys a product or service and can choose between different goods and suppliers.

Customer Service

Customer service is the direct one-on-one interaction between a consumer making a purchase and a representative of the company that is selling it. The procedure aims to provide to the needs of the client through professional service delivery interaction.

Customer Relations Management

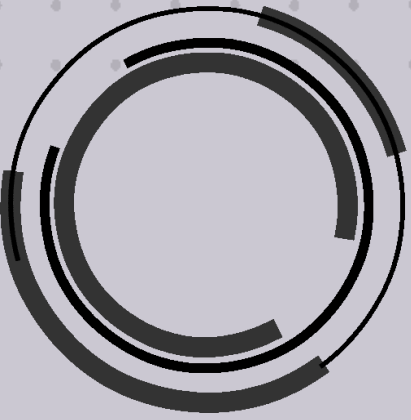
Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle.

Customer experience

Customer experience is the internal and subjective response customers have to any direct or indirect contact with a company. Direct contact generally occurs in the course of purchase, use, and service and is usually initiated by the customer



BASIC CONCEPTS



THEORY of CRM

CRM is a holistic process of acquiring, retaining and growing customers. It includes all in-line and off-line relationship management. (Strauss et al. 2003).

CRM THEORY ASPECTS

- **Recording** every customer and company interaction. (Note that this is not just for transactions; rather, it is for every single interaction).
- **Developing** sophisticated database measurement tools to demonstrate consumer preferences.
- **Collecting** data for a blatant purpose: shrink cost and increase employee productivity.
- **Focusing** on servicing existing customers (retention) rather than recruiting new ones.
- **Reliance** on highly skilled use of resources at significant price.



BASIC CONCEPTS



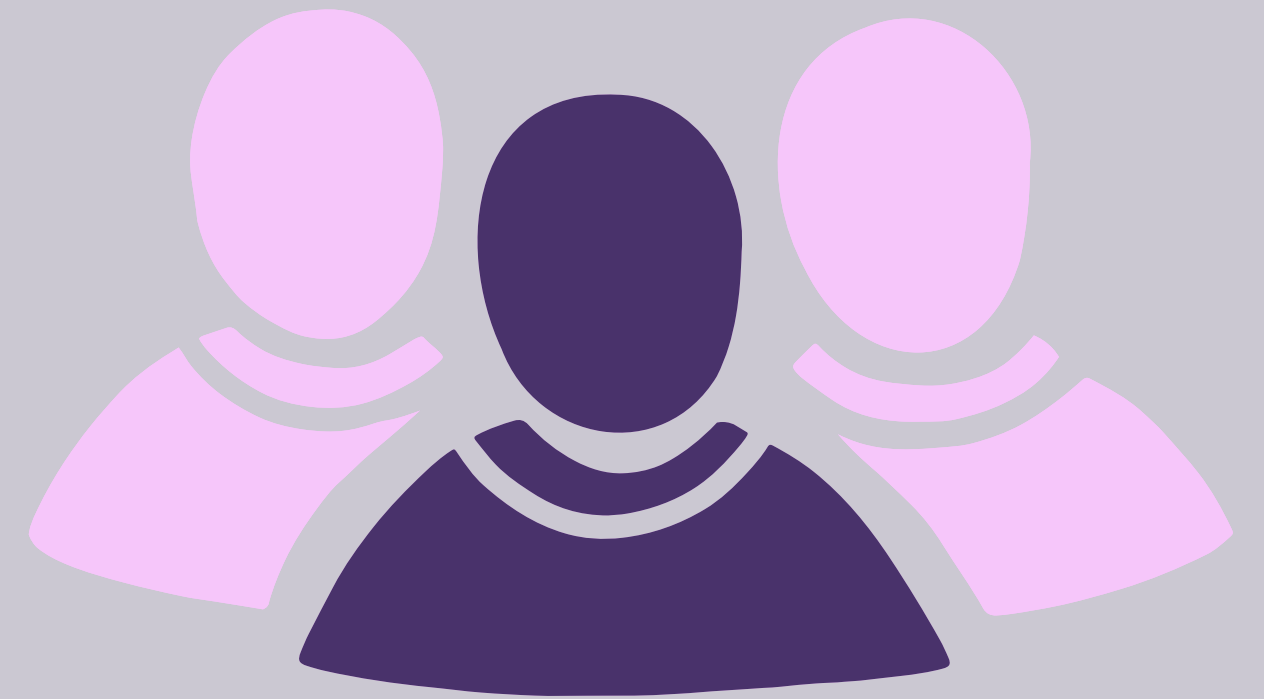
MISCONCEPTION

- Part of the sales process (which would look to recruit new customers).
- Part of the relationship between sales and the customer (which often targets every prospect as a potential buyer)



TYPES OF CRM

1. Operational - Sales, Marketing & Service automation.
2. Analytical - Data analysis.
3. Collaborative (Strategic).

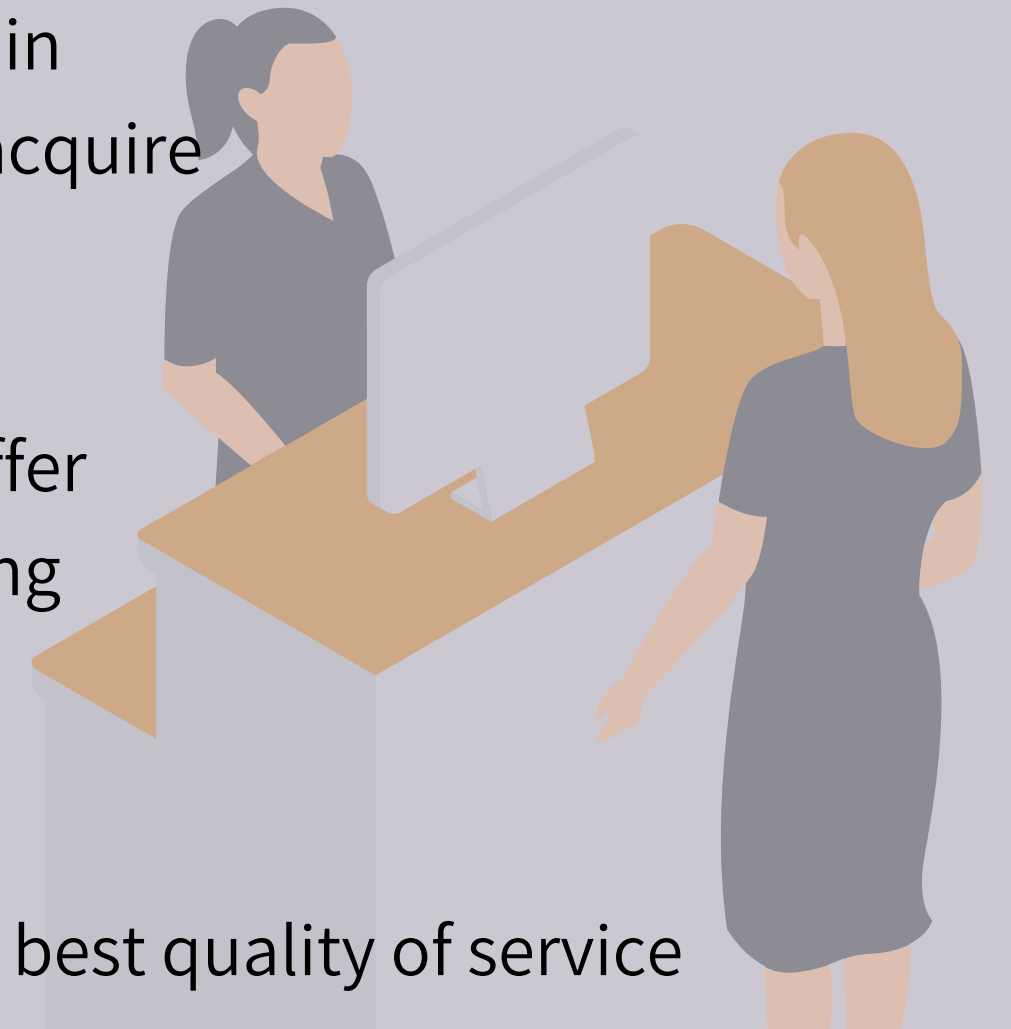


TYPES OF CRM



Operational CRM - streamlines the business process that includes Sales automation, Marketing automation and Service automation. Main purpose of this type of CRM is to generate leads, convert them into contacts, capture all required details and provide service throughout customer lifecycle

- ✗ Sales automation helps an organization to automate sales process. Main purpose of sales automation is to set standard within organization to acquire new customers and deal with existing customer
- ✗ Main purpose of marketing automation is to find out the best way to offer products and approach potential customers. Major module in marketing automation is campaign management.
- ✗ Service automation enables business to retain customers by providing best quality of service and building strong relationship

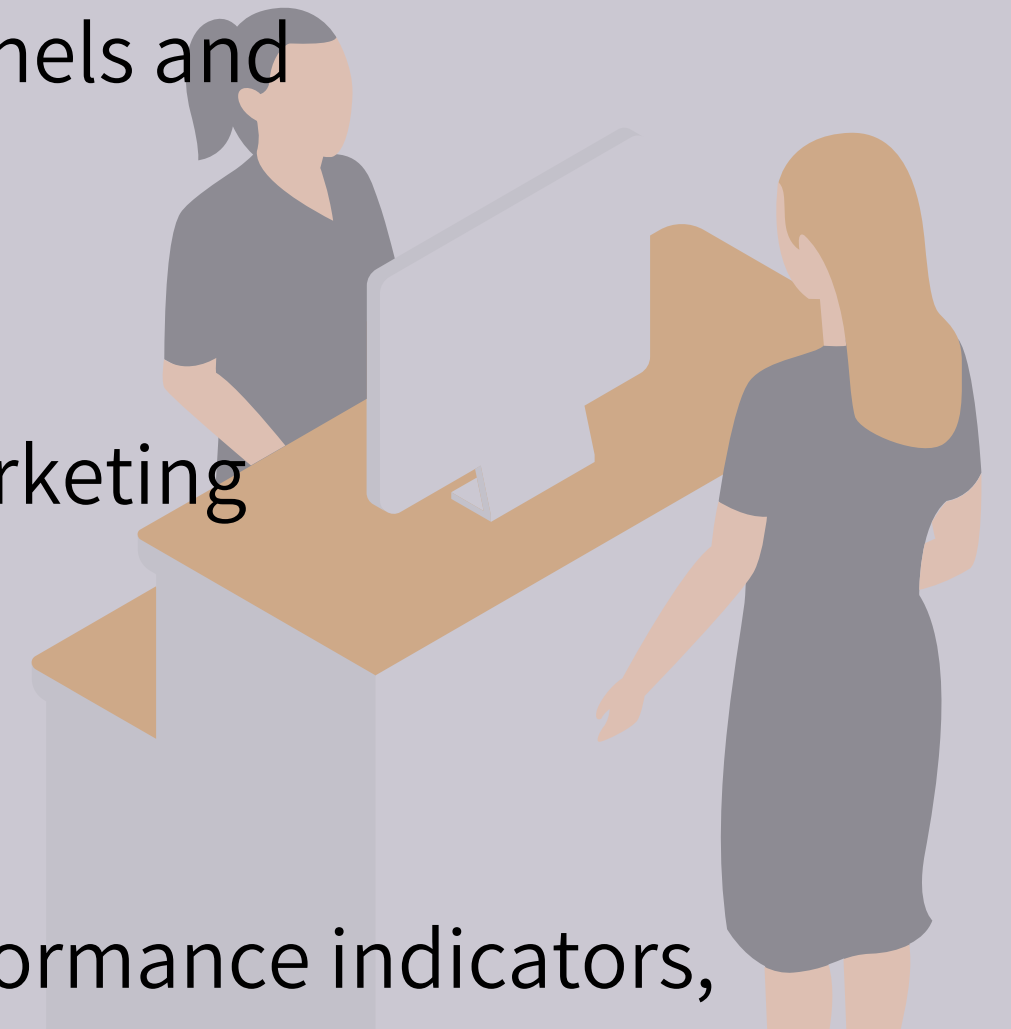


TYPES OF CRM



Analytical CRM helps top management, marketing, sales and support personnel to determine the better way to serve customers. Data analysis is the main function of this type of CRM application.

- ✗ Gather customer's information, coming from different channels and analyze data in a structured way
- ✗ Help organization to set business methodology in Sales, Marketing and Support to improve customer relationship and loyalty
- ✗ Improve the CRM system effectiveness and analyze key performance indicators, set by business

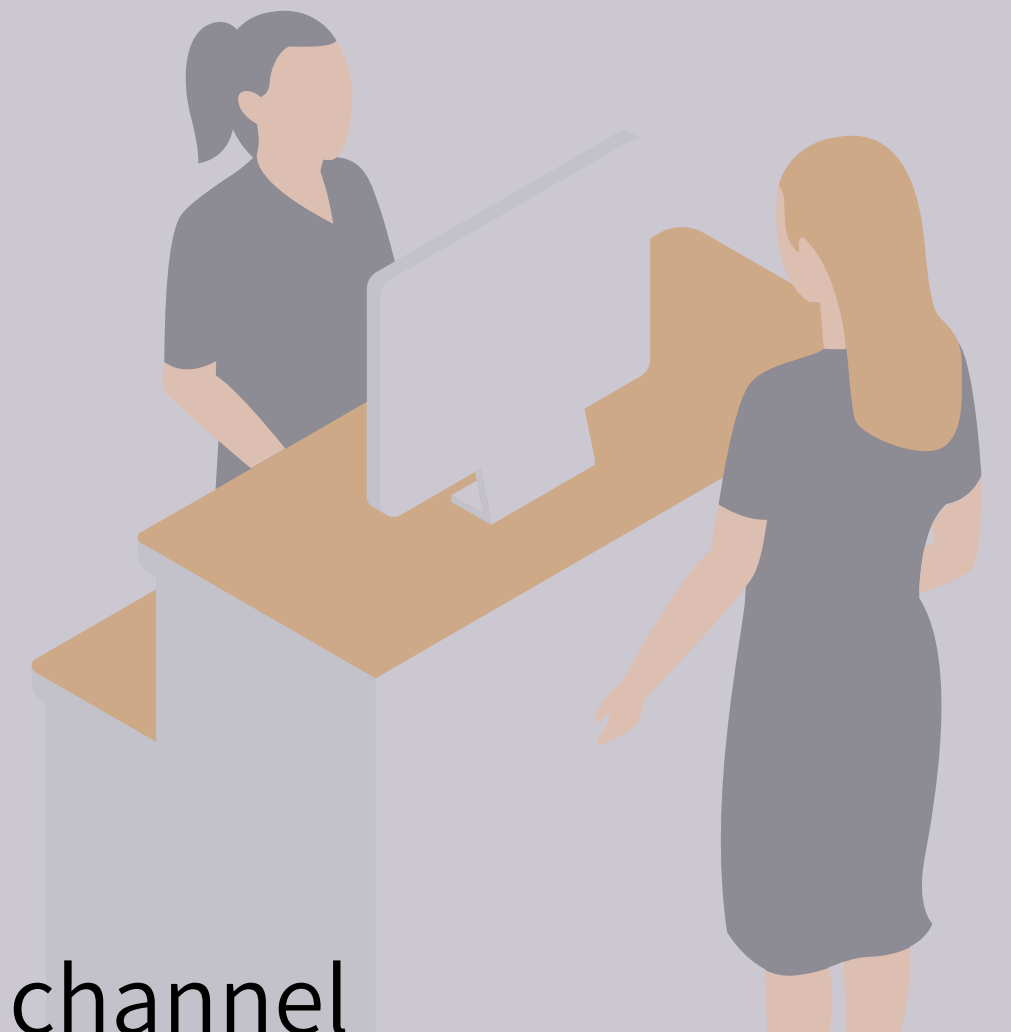


TYPES OF CRM

Collaborative CRM, sometimes called Strategic CRM, enables an organization to share customers' information among various business units like the sales team, marketing team, technical and support team. Furthermore, it is a method where a company gives a common platform to build synergy among all stakeholders for business process improvement, product innovation and pricing, customer or employee retention.

Advantages of Collaborative CRM:

- Improves customer interactions across channels
- Reduces service cost by using web or online collaborations
- Synchronizes customer data with call centre to allow multi channel interactions



MODELS OF CRM



MODELS OF CRM,

- IDIC MODEL.
- QCI MODEL
- CRM VALUE CHAIN
- PAYNE'S FIVE FORCE PROCESS MODEL

CRM models help you adequately understand how your business approaches, converts, and preserves customers:

- A CRM model states how your organization gets and retains customers.
- The most successful CRM models indicate your team how to learn about customers, analyse them, reach them and improve your approach.
- CRM software facilitates easier CRM model adherence while supporting your company's practices about customer data, sales, and relationships.



CRM MODELS

Identify: Under the IDIC model, the first step would be identifying your customers and leads. Every business needs to identify that who are its actual customers and should have a deep understanding of their customers.

Differentiate: Now your segmented customers, need to be differentiated based on the current and projected lifetime value that you expect them to bring to your business. Always remember not all customers bring the same value to the business.

Interact: The initial two steps under the IDIC model lay the foundation to set you up for actual interaction with customers and prospects, giving you a significant idea of the customer's demands and requirements so that you can provide them personalized content and information.

Customize: This is the final step of IDIC, it customizes your approach based on what you have discovered about your customers in the previous three steps. That means tweaking your deals or offers to adequately meet the customer's requirements or budget. The main purpose here is to assure that your customers' expectations and demands are satisfied.

1

The IDIC Model

This model intimates' businesses to take four actions to build, keep, and retain long-term one-to-one relationships with customers. It helps to evaluate the expectation of consumers and the value they add to the business.



CRM MODELS

The **Quality Competitive Index (QCi)** model is a customer management model. It begins with the customer's external environment, their business goals, pain points, and other factors that influence them.

This QCI model analyses the people and technology associated with it, which keeps this whole system running. It represents several activities that businesses need to perform to get and retain customers.

The QCi model helps you review modern practices and produce a quantitative approach to enhance the customer management process. This model is more of a customer management model rather than a consumer relationship model.

2 QCI model



This QCI model analyses the people and technology associated with it, which keeps this whole system running. It represents several activities that businesses need to perform to get and retain customers.



CRM MODELS

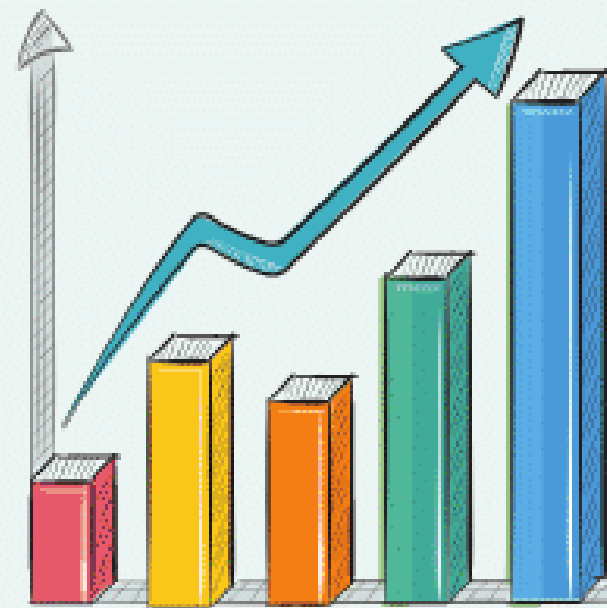
A CRM value chain is a high-level model that helps organizations identify and generate unique solutions for customers. With the help of this CRM model, you can discover which activities bring you the maximum value and improve your processes to adequately serve your customers to gain a competitive advantage.

This CRM model recognizes all the steps and activities needed to create a strong relationship with a customer.

3

CRM value chain

With the help of this CRM model, you can discover which activities bring you the maximum value and improve your processes to adequately serve your customers to gain a competitive advantage.



It is broken down into two stages being Primary and Support



CRM MODELS

This model incorporates five core processes in Customer Relationships Management (CRM), namely: strategy development, value creation, multichannel integration, performance assessment, and information management process.



The Payne's Five Forces Process Model



Payne & Frow's Five-Step Process Model assures that the consumer experience is consistent across every department, not only sales. This model incorporates five core processes in CRM, namely:

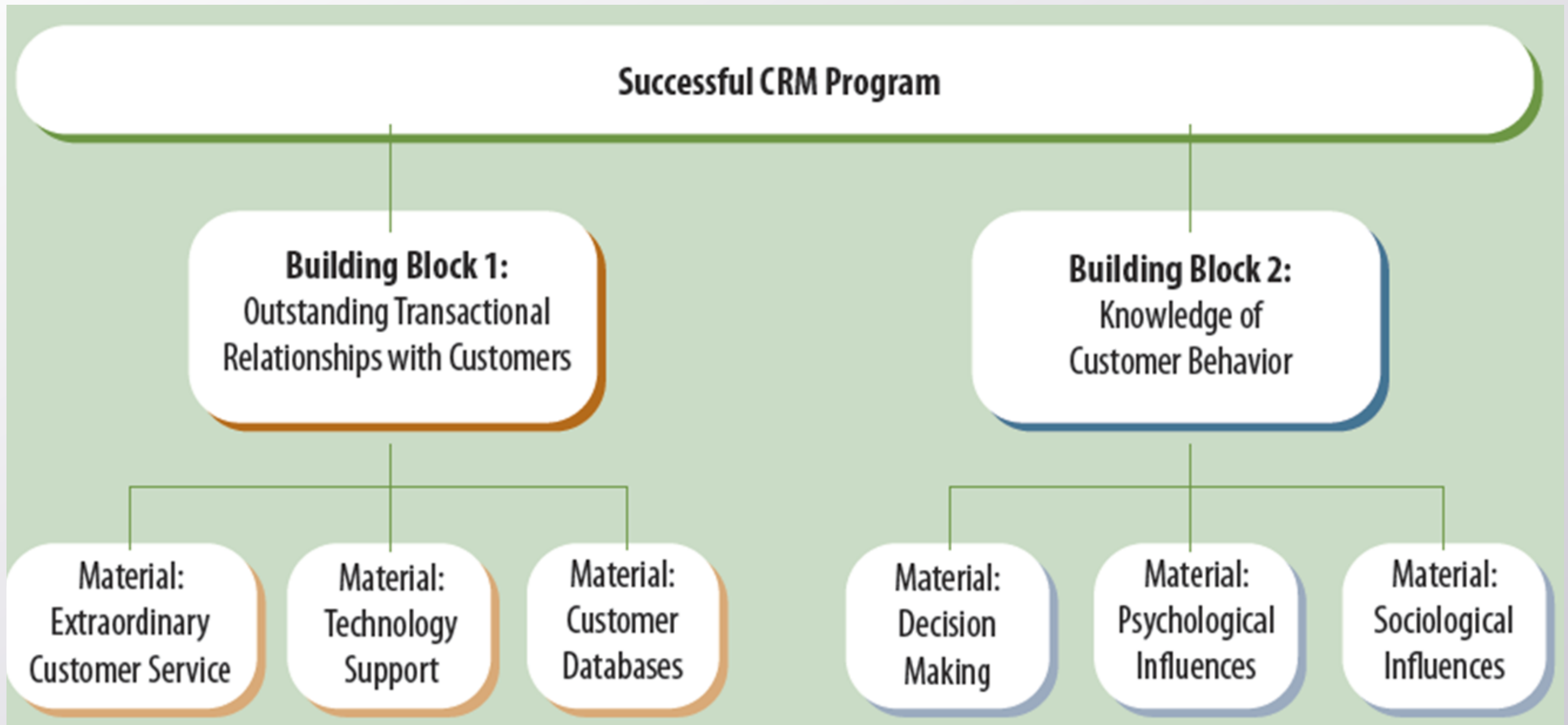
- strategy development
- value creation
- multichannel integration
- performance assessment
- and information management process.



Essential Materials of a Successful CRM Program

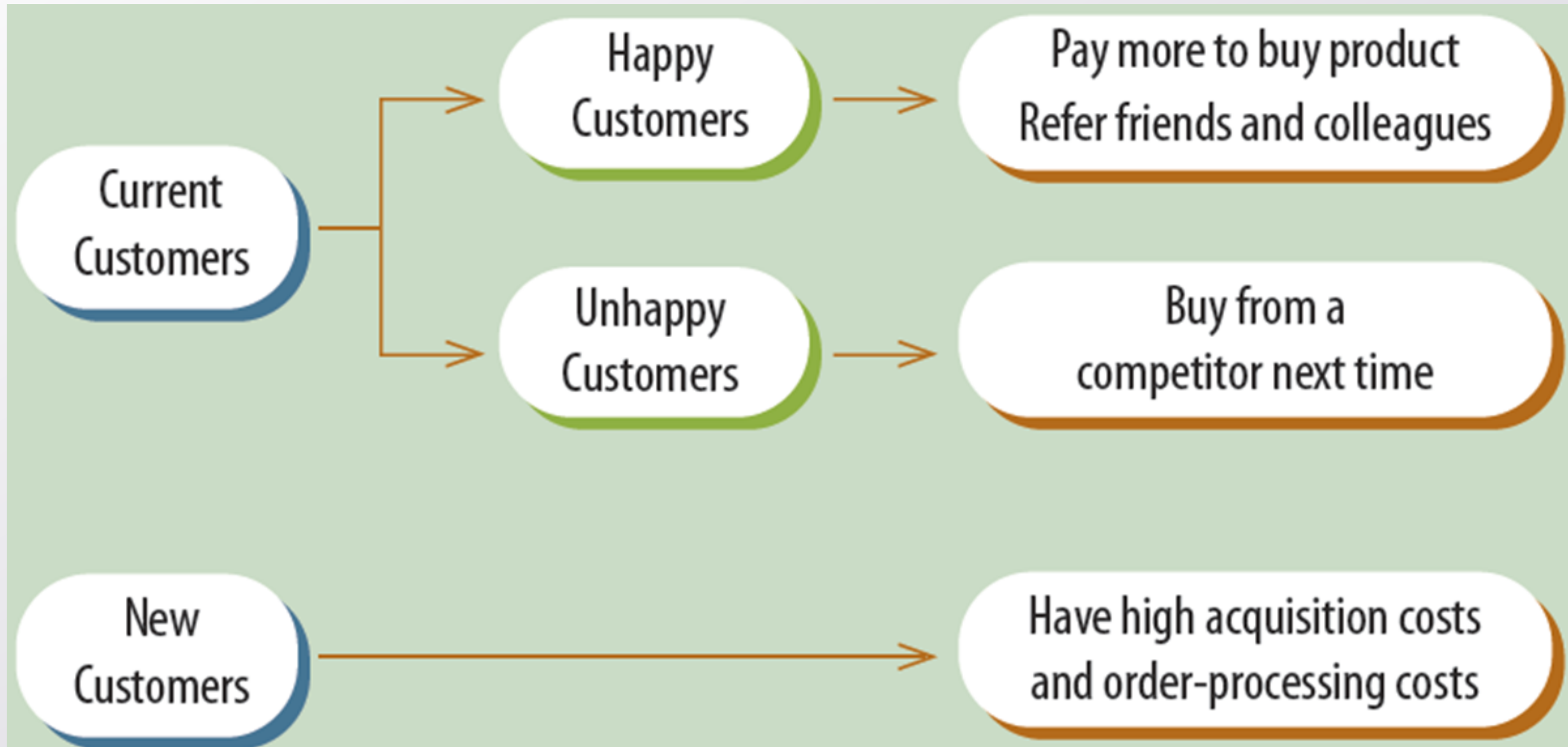


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Sources of the Next Sale



THE AIDA MODEL

This model analyses the prospective leads for customer service.

ATTENTION - percentage of consumers that are aware of your product advertisement.

INTEREST- percentage that is interested in finding out more about your product/service offers.

DESIRE- percentage of prospective customer that wants to purchase the product

ACTION- percentage that makes a purchase





Three marketing operational CRM technologies:

List generator – compiles customer information from a variety of sources and segment the information for different marketing campaigns.

Campaign management system – guides users through marketing campaigns.
Cross-selling and up-selling.

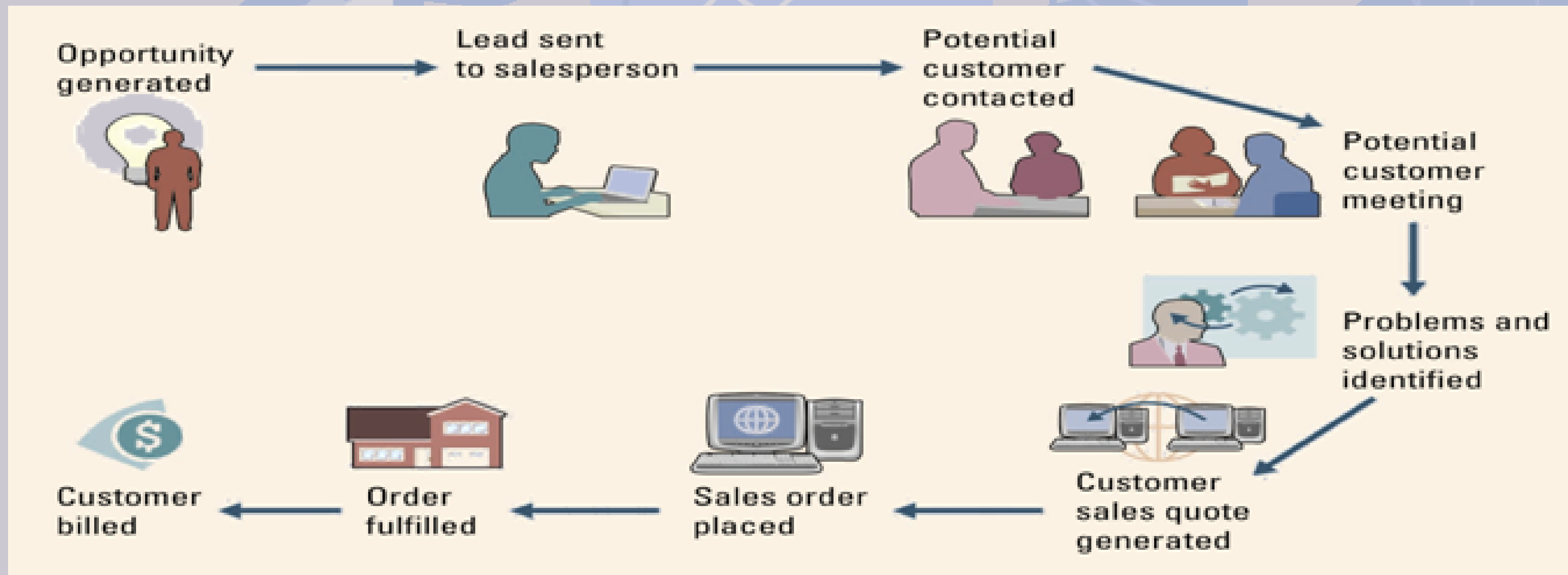
Cross-selling – selling additional products or services
Up-selling – increasing the value of the sale



Sales and Operational CRM

The sales department was the first to begin developing CRM systems with sales force automation – a system that automatically tracks all of the steps in the sales process.

Walk your students through the sales process displayed in the above figure



Sales and Operational CRM

Sales and operational CRM technologies:

Sales management CRM system – automates each phase of the sales process, helping individual sales representatives coordinate and organize all of their accounts.

Contact management CRM system – maintains customer contact information and identifies prospective customers for future sales.

Opportunity management CRM system – targets sales opportunities by finding new customers or companies for future sales



Customer Service and Operational CRM

Three customer service operational CRM technologies:

Contact center (call center).

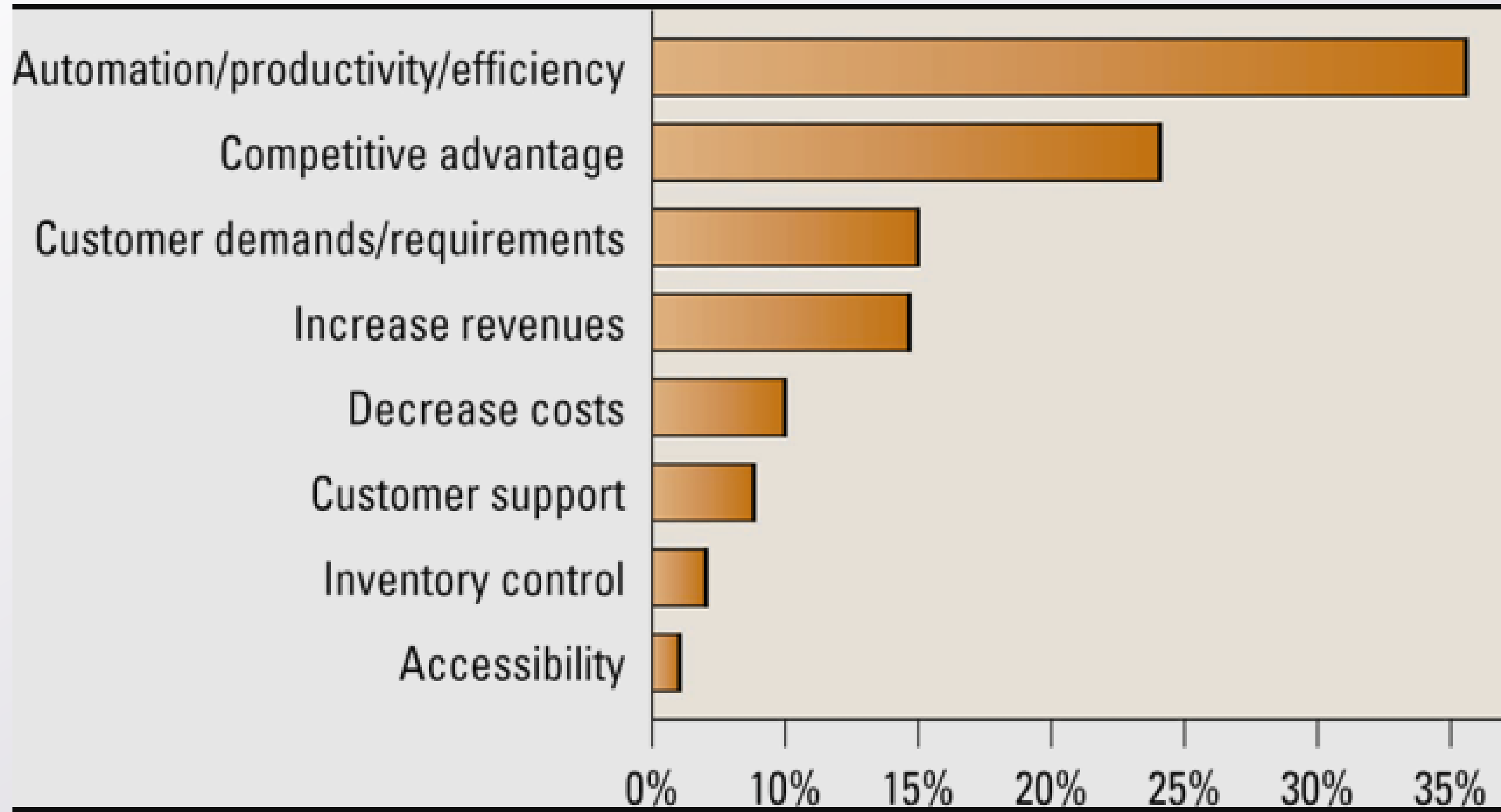
Web-based self-service system.

Click-to-talkCall scripting system

Contact center (call center)



CRM GROWTH FACTORS



CUSTOMER RELATIONSHIP MANAGEMENT'S SUCCESS FACTORS

1. CRM success factors include:
2. Clearly communicate the CRM strategy.
3. Define information needs and flows.
4. Build an integrated view of the customer.
5. Implement in iterations.
6. Scalability for organizational growth



SECTION 2 : CUSTOMER EXPEREINCE AND MANAGEMENT

Building a sustainable client relationship is key for retaining customer loyalty, profits and competitive advantage.



CUSTOMER EXPERIENCE

#CX

Why Customer Experience is as important as making a customer pay for your product.



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CX Concepts

Customers today have high expectations of services they receive, service accessibility, choice, speed to resolve issues, customization, personalization and more.

It is exceptionally important for every business to make a lasting impression on the customer/client, it goes beyond the product/service offered, its also about "How the customer feels while interacting with your business from the sales person, the store environment and the product"



What is Customer Experience?

- 
1. Amazing Experiences.
 2. Good Service.
 3. Great Products.



Making each customer feel welcomed,
valued and important



Defining CX

What is Customer Experience (CX)?

The sum of how customers **perceive interactions** with your company's products, services and/or people.

Good customer experience can be defined as the practice of building and responding to customer interactions in a way that **meets or exceeds demands, expectations and satisfaction**. It increases demand in the short term as well as loyalty in the long run. It leads to greater customer satisfaction, long lasting relationships and brand loyalty, encouraging repeat customers, creating a competitive advantage and boosting revenue.

**CUSTOMER
EXPERIENCE**



The Need For A Focus on the Customer

Customer Retention

It is all about end-to-end experience & relationship.

The customer journey (and experience) continues after acquisition and purchase.

Purchase Paradigm

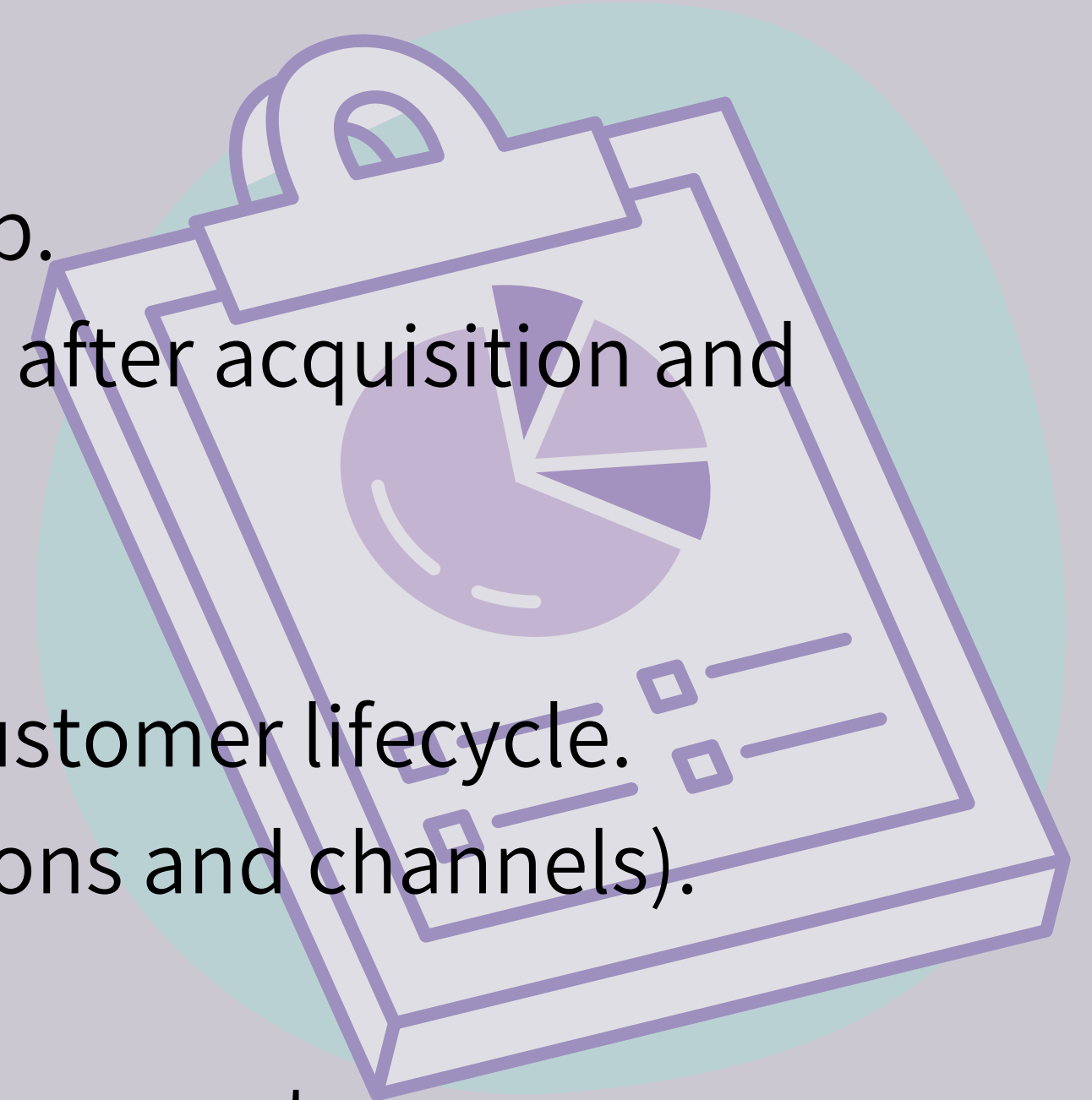
Shift Marketing funnels are being replaced with customer lifecycle.

Fragmented path to purchases (multiple interactions and channels).

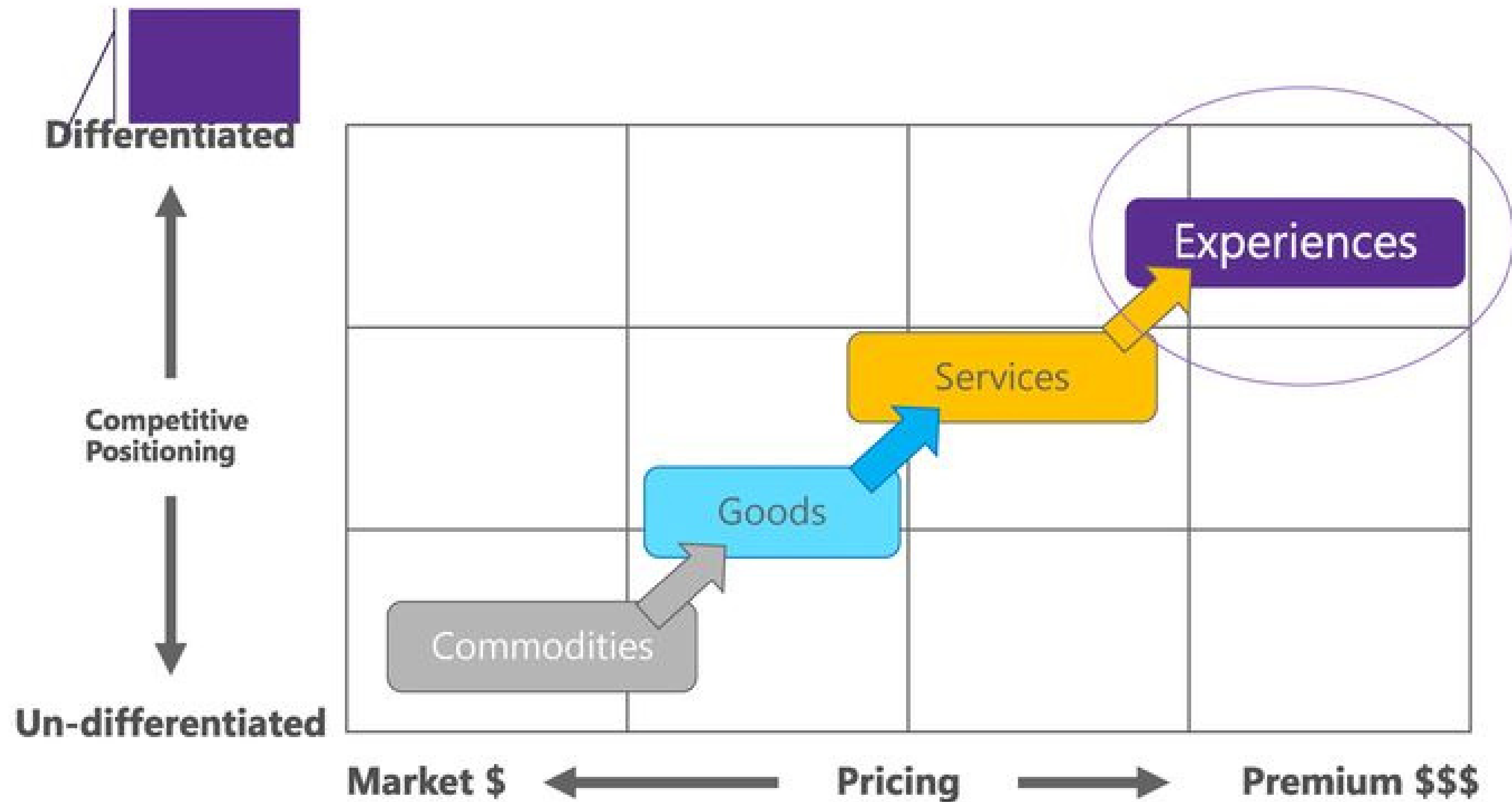
Quality of Experience

Companies must deliver relevant experiences, or lose customers.

Companies must measure interaction effectiveness throughout the entire lifecycle.



Customer Experience As a Differentiator



Customer Experience Example



Commodities

Goods

Service

Experience

Customer Experience overview

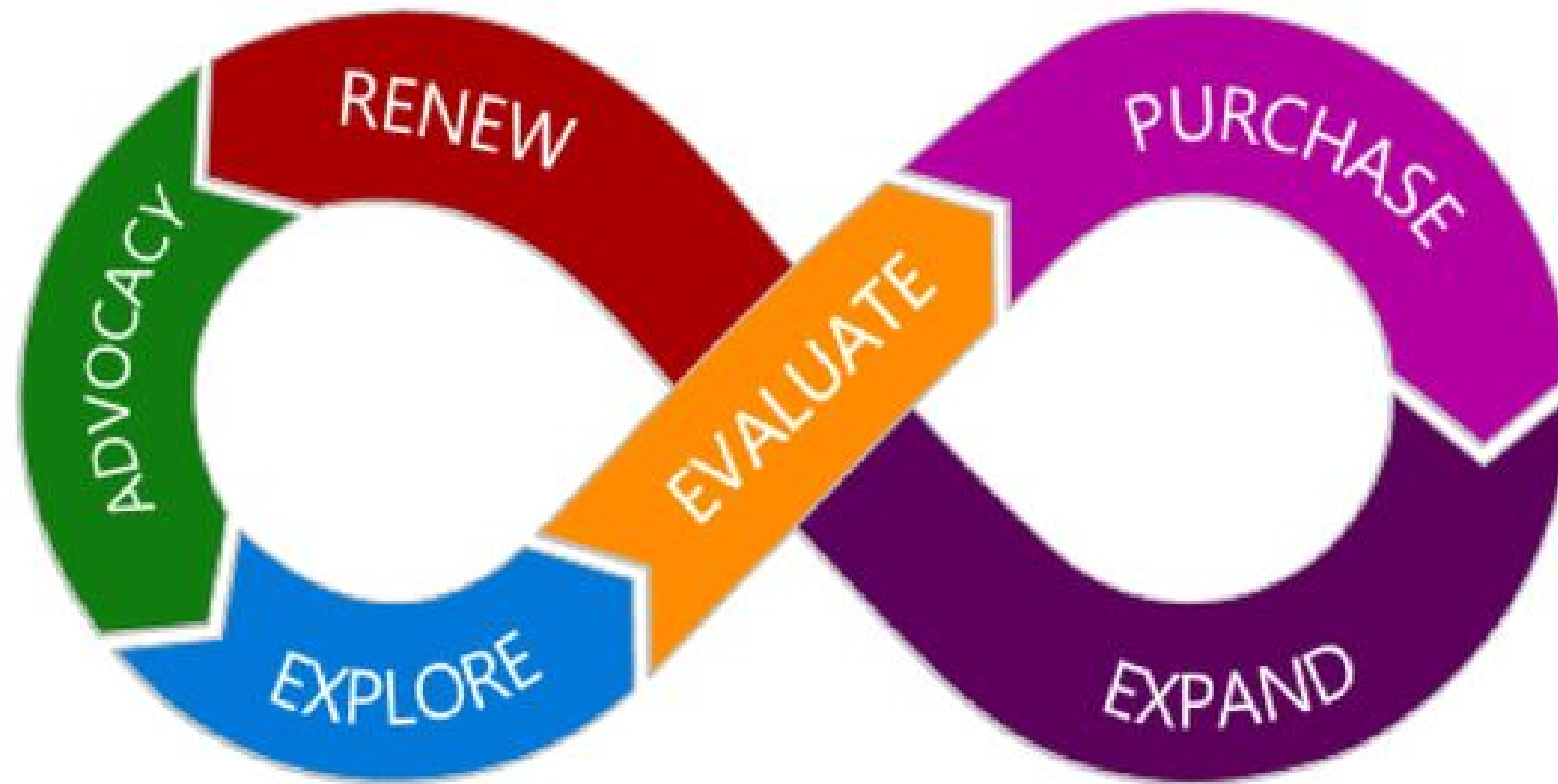
Creating a world-class, end-to-end customer experience can become a key strategic differentiator.

However, it requires a deep understanding of both the customers and how they interact.

Plus, a commitment to change business processes based on that understanding.



Understanding your customer



Customer Lifecycle

SECTION 3 : CUSTOMER SATISFACTION MANAGEMENT & COMMUNICATION

Ensuring that customers are consulted according to organizational requirements is important, moreover the ability to communicate efficiently and in a professional manner contributes to customer satisfaction.





What are the Wants and Needs?

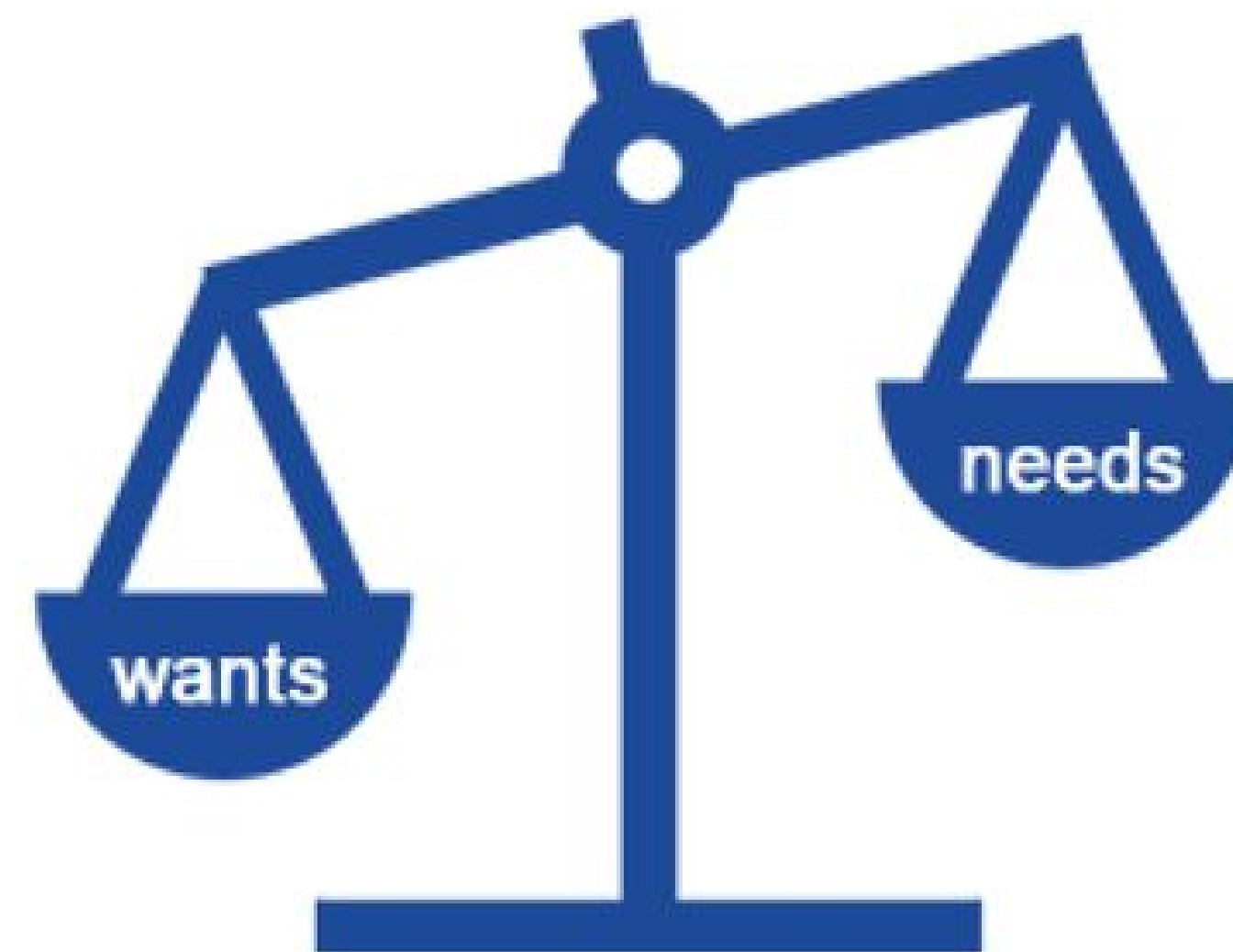
Wants – products or services that are not necessary but that we desire or wish for

Needs – products or services that are required

Wants and Needs represent personas' expectations and perceptions at each stage of the journey.

Typical questions when discovering wants and needs:

- What are customers trying to accomplish?
- What's most important to them at that stage?
- How do they want to feel?
- What are emotions, thoughts, feelings and reactions during experience.



What are the Interaction Touchpoints?

Touchpoints are customer interactions with a company via any channel, at any time, for any purpose.

Your touchpoints drive customer perceptions of your brand (what you stand for) and experience (how well you meet their expectations)

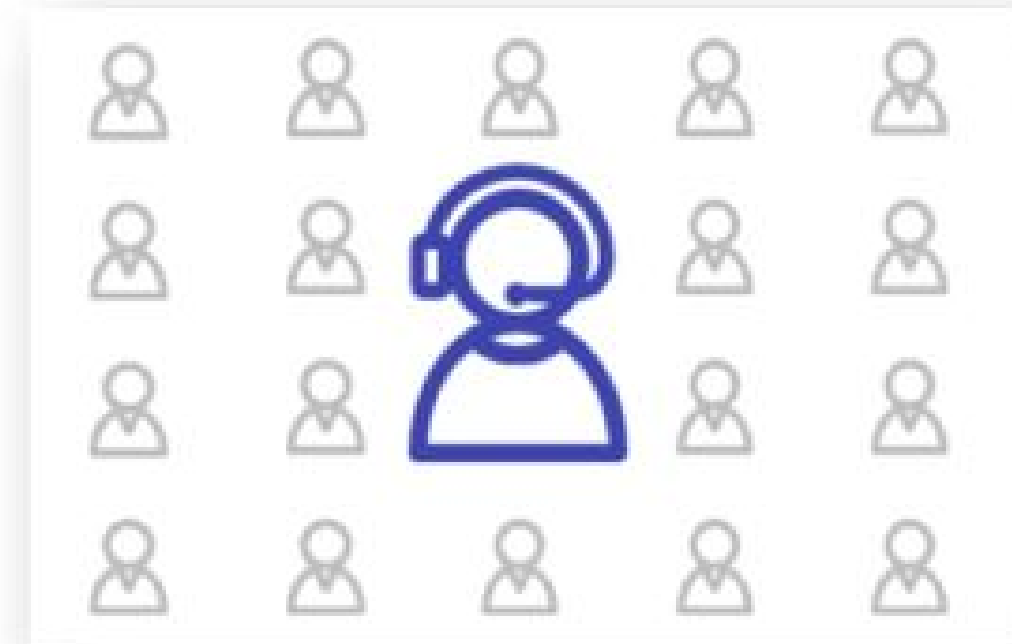
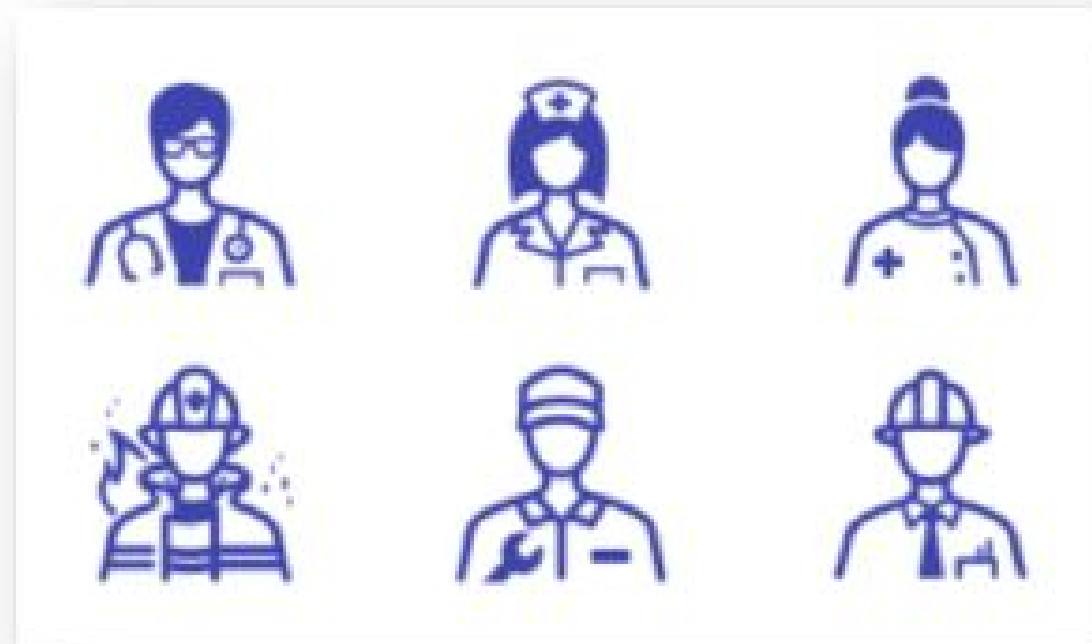




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How Do We Design Customer Experience?

We Can't Treat Everyone Differently **OR** Treat Them As If They Are The Same...



We design customer experience for a persona

SECTION 4: PROFESSIONAL CONDUCT & COMMUNICATION

Looking the part and being able to represent yourself in a professional and appropriate manner is always important. Keeping in mind that customer's impressions on an employee also reflect their perception of the business as you are the representative of the business when interacting with customers. Aspects such as body language, voice tone and dressing are important when communicating.



Ethical behavior & representation

Apply your knowledge of body language to improve communication

- Understand the impact of space in a conversation.
- Understand the nuances of body language from a range of areas including your face, hands, arms, legs, and posture. (Maintain an up-straight posture, with relaxed facial expressions that indicate attention and assertiveness. Never lean on to objects or have "frowned" faces when interacting with clients. Wear a smile and speak in a calm tone.
- Shake hands with confidence. (Always use welcoming yet professional gestures to end conversations or when meeting a customer, handshakes are a good example.)
- Dress for success (Looking presentable and professional always draws a positive first impression to customers.)



END OF CHAPTER ASSESSMENT

30 QUESTIONS



MODULE-SELF EVALUATION

END OF MODULE



ADDITIONAL LINKS.

<https://youtu.be/x3AkbhCmV20>

https://youtu.be/SjYo_zi_vZQ

<https://youtu.be/5Z6XVoPkzh4>

<https://youtu.be/fFGdJWlptnY>

