

Has your business
outgrown spread sheets?
Improve sales and marketing
initiatives by making the case
for Customer Relationship
Management (CRM) in your
company.



Millions of business people use spread sheets every day to share information with their colleagues and keep track of customers. Spread sheets serve as a key business tool for sales and marketing reporting and for keeping track of customer databases, but as your business grows, you may also find that you are outgrowing spread sheets

What would you say if we told you sales and marketing teams can become more productive and efficient by finding a new home for key business data and reporting?

Like the young family that outgrows their first home, a time will come when your business needs to move its data out of spread sheets and into a CRM tool.

In this eBook, we describe what happens when businesses outgrow spread sheets and why there are more reliable tools for sales forecasts. And then, we explain how you can make the case for moving key business data out of spread sheets and into CRM within your company.



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1.0 You know you've outgrown spread sheets when...

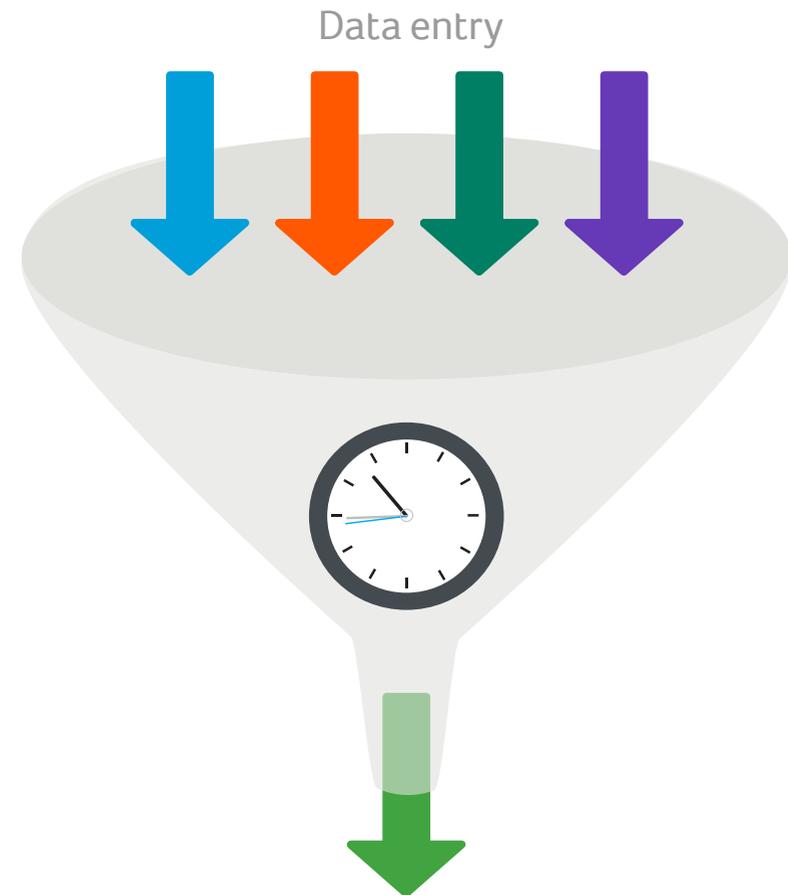
1.1 Data entry is becoming a bottleneck

As an effective business person, you go out of your way to address inefficient business processes, but have you considered data entry as a bottleneck in your company?

For example, a shipping company may use a spread sheet to compile data related to account handling, sales processing, shipment and accounts receivable. And employees of this shipping company may email copies of their spread sheets to each other so they can collaborate throughout their working day.

This means various employees are working on, and making changes to multiple versions of key spread sheets. Even if these employees avoid making mistakes, they're still going to spend a part of their working day ensuring their data is consistent and up to date.

Businesses increase the probability of company-wide mistakes when they rely on tools that involve different people entering data at different stages.



Has your business outgrown spread sheets?
You know you've outgrown spread sheets when...

Widex

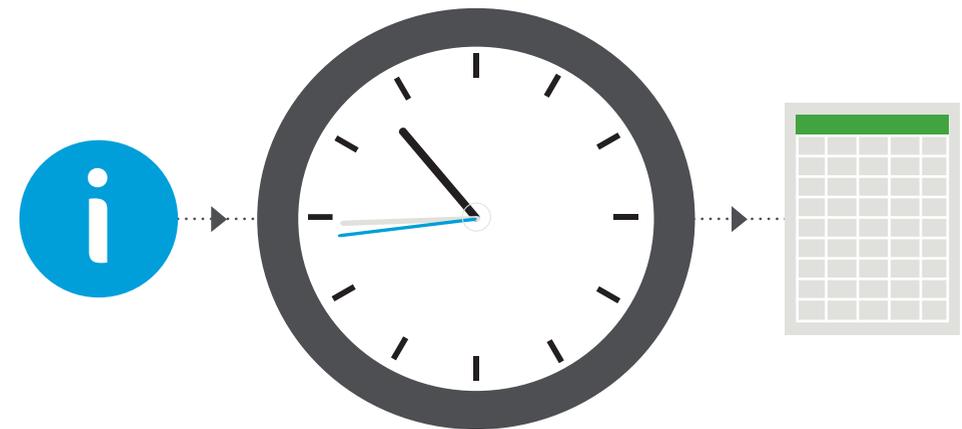
Widex, the Chinese subsidiary of a Danish manufacturer of hearing aids, has been running its business out of Shanghai since 1998 and employs 127 people. Prior to deploying a CRM tool, managers regularly spent time consolidating and verifying information in multiple versions of the same spread sheet. And it had over ten years' worth of key customer information packed into hundreds of cells, rows, columns, and sheets.

“We had a problem with the integrity of the data. Spread sheets are very vulnerable; information can easily be deleted or wrongly entered... and we didn't have the database management tools to extract the information we wanted.” says Steen Teisen, Chief Executive Officer, Widex, China.

Today Widex uses a CRM solution, which has helped reduce the amount of manual errors the company experiences and enabled them to leverage key business data for competitive advantage.

1.2 Sales and marketing teams lose time manually inputting data

The nature of spread sheets means users must input key account information on a line-by-line basis. This can take a significant amount of time at the end of a month or quarter; and many sales and marketing teams say this is time they could better spend answering sales queries or discussing ideas for new sales promotions and marketing campaigns.



Has your business outgrown spread sheets?
You know you've outgrown spread sheets when...

American Pool Enterprises

Sales teams working for the swimming pool and recreational facility management company, previously used individual spread sheets to keep track of bids in progress. This process made it difficult to track how many bids the company had in the market at a given time, let alone the status of existing customer relationships.

Now with a CRM solution, the sales team for American Pool Enterprises can accomplish more in less time and get a better view of the company's relationships with customers and leads.

“Man-hours are where the savings are coming from. We have been able to streamline so many processes that used to take people hours,” says Karen Snyder, Chief Information Officer with American Pool Enterprises.

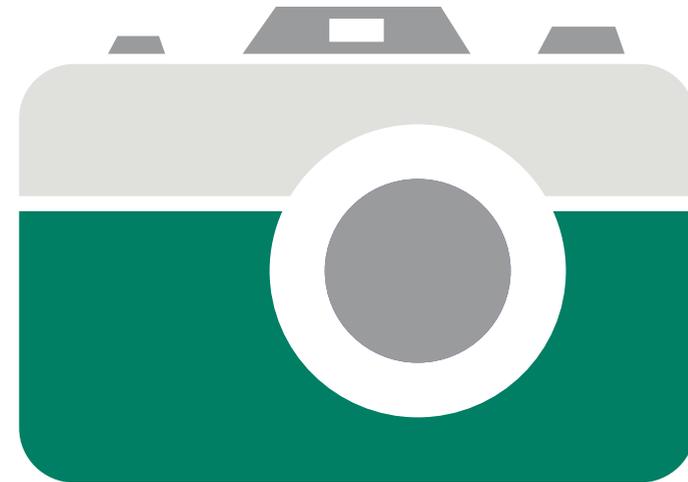


1.3 You want to see the full picture before making crucial business decisions

No manager wants to make key business decisions based on limited or out-of-date information, and yet many managers spend hours examining marketing and sales information presented on a spread sheet.

Spread sheets are a useful reporting tool, but most spread sheet applications limit real-time sharing or restrict the ability of sales and marketing teams to update information as a team. And with no central place to store this information, you may find that individuals or teams report their information separately or base their reports on out-of-date information.

This disjointed workflow makes it harder for you to pull together the information you need to manage your company.



Has your business outgrown spread sheets?
You know you've outgrown spread sheets when...

Sign + Digital

Sign + Digital is a leading distributor of raw materials to sign makers and digital printers. During its formative years, the company faced several challenges as it grew.

Its sales team had to manually compile and administer sales and pipeline reports. And the company's managers found it difficult to centralise data in an accountable and transparent way.

With a CRM solution in place, Sign + Digital can now report on its data in real-time and get an accurate picture of how sales are performing.

“Sage CRM was at the very heart of our ethos and was the key driver to help us not only service our customers better but also make our staff work more efficiently and productively,” says David Walsh, Finance Director of Sign + Digital.

In the next chapter, we explain the benefits of moving your sales forecasts from spread sheets and into a CRM tool.



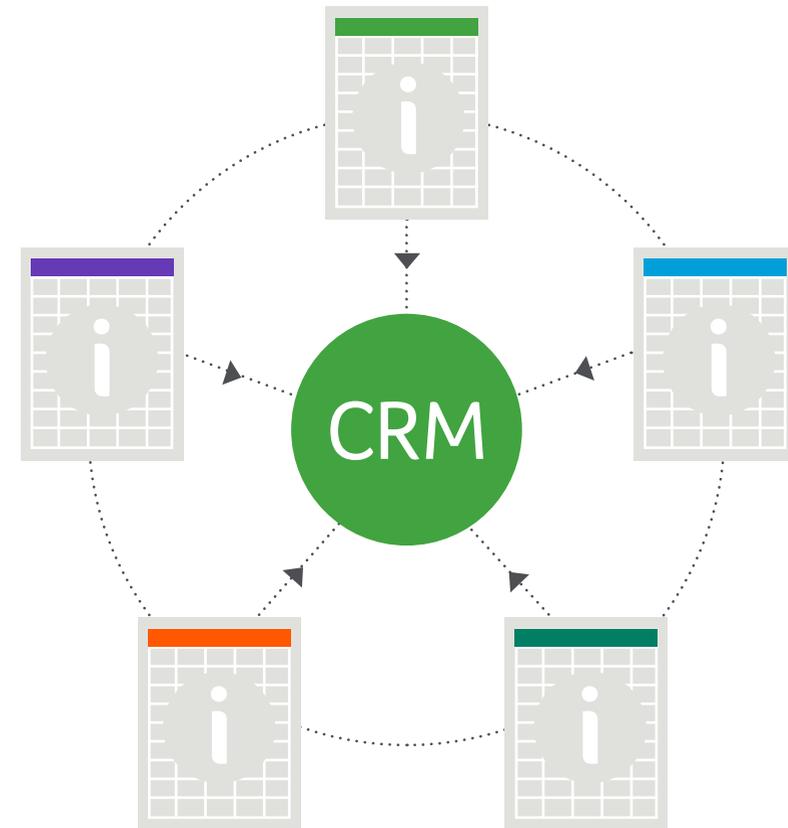
2.0 8 reasons for moving sales forecasts out of spread sheets and into CRM

2.0 Eight reasons for moving sales forecasts out of spread sheets and into CRM

Spread sheets are a great tool. You can use them to create budgets, build lists and generate some basic reports. They will always have some role in an organisation but no matter how skilled or creative you are with spread sheets, they have their limits.

You cannot run a growing sales organisation solely through spread sheets. Managers that try are unknowingly paying a penalty in terms of lost time, limited access to information and ultimately lost sales.

Here are eight compelling reasons why you should move your sales forecasting out of spread sheets and into a CRM tool.

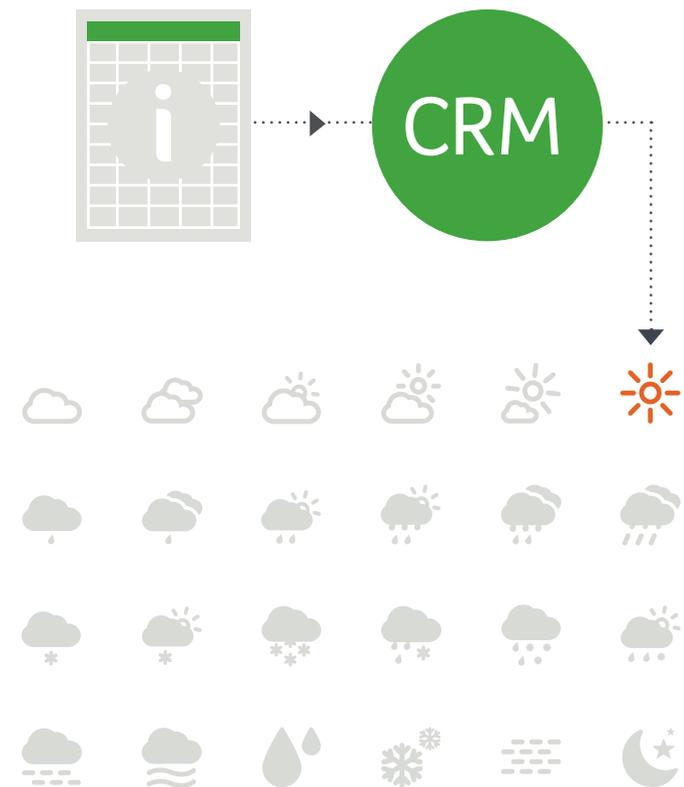


2.1 You can improve the quality of forecasts

Spread sheet-based forecasts can be limited because they don't provide information like:

- How many leads, presentations or quotations are required to generate a sale.
- The number of leads or enquires required to meet a target.
- The effectiveness of particular sales and marketing campaigns and the response from different markets or segments.
- The volume of pre-sold business and the progress in respect of expected orders.
- The number of customers who placed orders during the previous period or during the same period last year.
- The number of customers that are spending more or less on a particular product or service.
- The average level of discount on sales.
- Sales trends by product, by market or by segment.

A successful CRM tool can fill this gap and, when connected to your business's ERP solution, it can offer greater insight into the purchasing history of customers.



2.2 You can act on more accurate sales information

If different business departments can only access data from their part of the business, or if they are using inaccurate or out-of-date data, your business's productivity and efficiency will be reduced.

A spreadsheet provides a snapshot of a point in time and, unless it's manually updated, quickly becomes outdated.

For example, forecasts for the next quarter won't update when you reschedule a potential sale that is set to close. This is compounded when sales and management teams use different versions of a particular spreadsheet.

This is where a CRM tool can help. A CRM tool is dynamic and reflects changes in terms of stalled sales and recently acquired business through a pipeline analysis or forecast.

“[Sage CRM] gives us the ammunition to get out there and talk to the customer. We have real time activity and information being filtered through all facets of the business,”

Matt Golby, Systems Manager at
Hyundai Construction Equipment,
Australia.

2.3 You can stay grounded in reality

Sales people are by nature optimistic, and this optimism can creep into their interpretation of spread sheet based sales reports. As a manager you may have faith in the judgement of your sales team, but sometimes you need to be able to interpret the logic behind their graphs and charts.

CRM enables you to taper their optimism with reality. If you decide on Sage CRM, you can access it securely from anywhere, set up automatic reports and generate predefined graphs. This means you can ensure a more objective standard of completed work in respect of each account or opportunity.

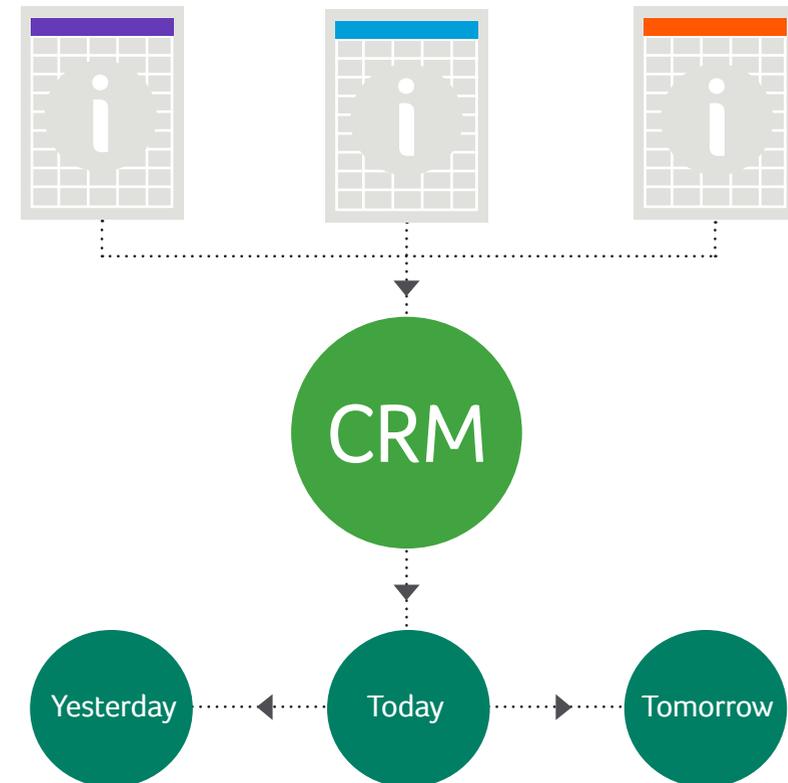


2.4 You can plan ahead more effectively

Spread sheets don't trigger actions in a diary when an action is allocated to an account or an opportunity. And they don't provide a record of the associated actions, emails, meetings and so on.

This makes it harder to figure out your next action for a particular customer, client and account. Often, the only way to find out is through a flurry of emails, phone calls or meetings about meetings.

With CRM, on the other hand, you can review past meetings notes, address outstanding actions and plan your company's marketing and sales initiatives based on current customer information.



2.5 You can protect your business

Spread sheets can be a personal thing. In many cases, only key sales managers or reps understand the quirks of a complicated spread sheet and how the various formulae were derived or calculated.

What happens if these sales managers or reps leave your company?

Their knowledge goes with them, and the spread sheets they leave behind become irrelevant or unusable and have to be recreated.

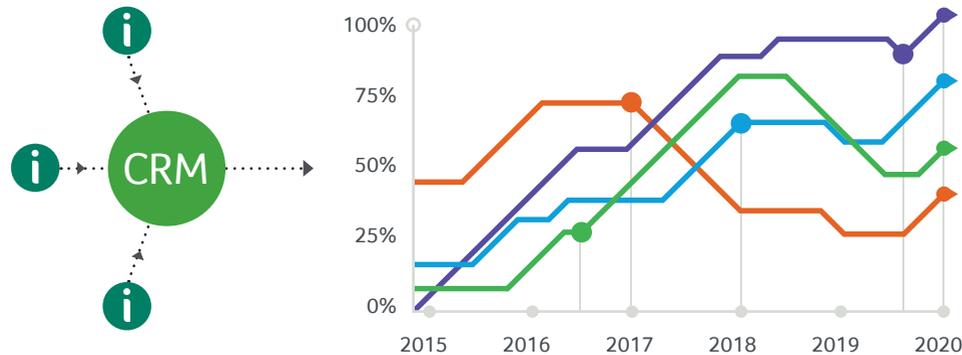
If you want to protect your business from the effects of staff turnover, keep company, contact and opportunity data in a central repository. This way, you don't lose key information or have to reinvent the wheel each time a rep or manager leaves.



2.6 You can use better metrics to track progress

A spread sheet can't give a sales manager the metrics they need to build and stand over solid sales forecasts. These metrics include the ratio of leads to orders, the win rate of proposals, and quotations.

Measuring and tracking metrics allows managers to apply an activity-based, or bottom up approach, to sales forecasts. This means forecasts are based on targeted activity levels, such as the number of leads and sales presentations, the number of proposals and quotes, and historically proven conversion rates.



“Sage CRM enables us to know what we are doing in terms of where we are, what’s out there, and what we should be going after. It has certainly contributed to our growth,”

Karen Zfaty, Director of Marketing Information Systems at PARS, USA

2.7 You can take the surprise out of a setback

Managers shouldn't have to spend hours preparing a report in order to know what is going on with a campaign. They shouldn't have to wait until the end of the month for reliable and current sales data.

Managers should be able to see their pipeline at a glance. They should be able to identify priority accounts, opportunities, customers that are at risk, and so on. They need a dashboard of key metrics, which alerts them immediately of a deal that has failed to close or a customer who didn't re-order.

There's nothing more unnerving than an unexpected setback against a sales target. CRM won't prevent these setbacks, but it will take the surprise out of the sting.

“Pulling all the data together for any kind of analysis used to be a nightmare and I would question the overall accuracy of manual reporting,” he says.

“Sage CRM gives us a real quick overview of where we're at and where we're going. It's absolutely excellent software.”



Dennis LeVan, IT manager at
Thermo-Twin Windows,
USA

2.8 You can guard your time

Managers who track sales and marketing campaigns with spread sheets are losing valuable working hours. They are spending time gathering information and preparing reports that they could spend more productively.

Using a CRM tool, you can see as much or as little, customer, campaign, and opportunity information as you need ahead of any meeting. And you don't need a salesperson to tell you what is happening in your company.

CRM should save you time and enable you to ring-fence hours of your day that you can use to manage key projects and company-wide initiatives.

In the next chapter, we discuss how to make the case for CRM in your company and move key sales and marketing data from spread sheets into a CRM tool.



3.0 Making the case for CRM in your business

3.1 Identifying how CRM can help your business

Modern CRM solutions, like Sage CRM, enable you to sign up and start using CRM almost immediately.

The job of migrating sales data from spread sheets to CRM is relatively easy, and any CRM professional can talk you through this task or you can access online videos to help you do it yourself.

As a manager, your job may be to make the case internally for moving sales and marketing business data from spread sheets into a CRM tool.



Activity

If you're in this situation, you can make the case for CRM by considering three key challenges that spread sheets typically present to growing businesses.

These are:

- Inefficiencies due to data errors
- Lack of productivity due to lost time
- Limited access to up to date information

Ask your sales and marketing departments if their spread sheets present any of these challenges and record their answers. Next, you can qualify this research by asking employees in each department to complete the following sentence:

The most frustrating parts of my job are:

3.1 Identifying how CRM can help your business

Now, consider the benefits of CRM.

These are:

- 1 Improved interdepartmental communication** by enabling each department to collaborate more easily, using one simple tool.
- 2 Reduced duplication of work** by giving employees the ability to update a single, central database instead of wasting time patching business processes together.
- 3 More informed business decisions** by providing managers and business owners an enhanced real-time visibility over their business and customers.

A more customer focused business by allowing each department to track and record key customer information and make this information available to relevant people throughout your business.
- 4 Increased productivity by** ensuring employees are more productive and businesses processes and workflows are more efficient.

Some managers want a CRM tool because it gives them greater visibility and control over sales. Some managers want a tool to boost their marketing initiatives or customer service. And other managers want CRM to manage customer and prospect information more efficiently.



3.1 Identifying how CRM can help your business

The question is:

Which type of manager are you and what key business challenges are you going to prioritise today?

By mapping the concerns of your business's sales and marketing departments to specific benefits, you can make the case for moving business data into CRM.

Next, we explain four strategies that you can use to help your company migrate key business data from spread sheets into CRM.



3.2 Four Strategies for Back to Basics CRM

In this eBook, we've focused primarily on the experiences of sales and marketing teams. This is because our experience shows sales and marketing departments rely heavily on spread sheets, and they're often keen to get started with CRM. Rolling out a new solution one department at a time is a useful strategy, but don't lose sight of your overall goal for CRM and for your business as a whole.

There are four strategies for back to basics customer relationship management, these are:

1. Plan for success
2. Meet the needs of all stakeholders
3. Provide official training
4. Approach CRM as a company-wide rather than department specific solution

These four strategies can help you move beyond spread sheets, start using CRM, make better business decisions and focus on the customer.



Watch David Beard, Sage CRM Principal discuss the benefits of CRM

 <http://bit.ly/BACKCRM>

3.2 Four Strategies for Back to Basics CRM

1

Plan for success

The best CRM solution in the world won't meet expectations unless you plan for it in a way that matches your business requirements.

You can create a blueprint describing your goals and expectations for how CRM is going to handle crucial business data. If you give ownership of this blueprint to one person, they can become a point of contact for employees who have questions about moving their data from a spread sheet to CRM.

And, your designated point of contact can liaise with your CRM provider in case in technical queries.

This way, your departments can migrate data without paying a penalty in terms of lost time.

2

Meet the needs of all stakeholders

If you involve internal and external customers and stakeholders, CRM will increase productivity and efficiency in your company.

To do this, consider:

- What are the best practices for your sales force, for your marketing team and for customer service?
- What are the various types of data that are important to track for each stakeholder group?
- What problems are your customers having and how will a CRM solution address these?

If the CRM lead in your company understands the data requirements of each group, he or she can help them get more from CRM.

3.2 Four Strategies for Back to Basics CRM

3

Provide official training

Your CRM solution should feel intuitive, well-designed and easy to use. This way, it won't take long for employees to implement CRM into their working day.

That said you can encourage employee buy-in by offering some training within your company.

Training gives employees the confidence they need to use CRM. If you decide on this approach, training won't cost much money or time if it's kept short and relevant.

For example, a technically adept sales manager won't get much out of a training session that focuses on the basics of data entry. And customer service agents probably won't want to hear about sales management.

Instead, tailor training for end users and explain how it can help them accomplish more in less time.

4

Approach CRM as a company-wide rather than department specific solution

As your company moves to CRM, you can consider questions that weren't possible to answer when it kept sales and marketing data solely within spread sheets.

For example:

- Could your sales team benefit from access to key customer information on the road?
- Would your marketing department like to report on campaign types quickly and easily?
- How can you collate and manage feedback from customers and use this feedback to provide better customer service?

Conclusion

There will always be a place for spread sheets in a business. But instead of relying solely on spread sheets, consider them as a complementary tools to a CRM strategy. This way, you can gain a real-time view of key sales and marketing information and make better business decisions.

If you move sales and marketing information out of spread sheets and into a CRM tool, you can reduce business errors and increase productivity. And you can protect key business data and ensure sales and marketing teams collaborate on current information.

To make the case for CRM in your organisation, listen to the concerns of your departments or teams and map the benefits of CRM to the problems they experience on a day-to-day basis. Then, it's important to plan appropriately for CRM so that it meets the needs of all stakeholders across your organisation.

Always remember the primary purpose of a CRM tool is to fix a problem in your business, address your priorities as a manager and contribute to the bottom line. And like the family that moved from a small starter home to a larger house, after your company starts using CRM, you can look back on the days your organisation lived with just spread sheets and wonder how you managed.



Has your business outgrown spread sheets?
How Sage can help

How Sage can help

Sage has been working with small and medium sized companies for over 30 years. We have helped thousands of businesses to acquire, retain and delight their customers and achieve their business ambitions.

Over 14,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, increase their business productivity, and make every customer interaction count.

Sage CRM is used by successful, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to grow their business.

When combined with Sage ERP, our customers enjoy better business insight, greater efficiencies and productivity, and a single, customer-centric view across their entire business.

So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Start your 30-day journey to business success now at [sagecrm.com](https://www.sagecrm.com).





Sage energizes the success of businesses and their communities around the world through the use of smart technology and the imagination of our people. We are reimagining the business of doing business and bring energy, experience and technology to inspire our customers to fulfill their dreams. We work with a thriving community of entrepreneurs, business owners, accountants, partners, developers and 3rd party service providers who drive the global economy. From social accounting apps to enterprise-class software, millions of businesses use Sage to transform the way they work. We are a FTSE 100 company with 13,000 employees in 23 countries. For more information, visit www.sage.com.

