Better document management, Better CRM

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Executive Summary

Customer relationship management (CRM) has been around as a concept since the 1980's, based on the theory that improving the quality of customer service and customer experience would help improve customer retention and increase sales revenue. This is still true today, and with the advance of technology, there are numerous software applications on the market that promise to automate CRM processes. But have businesses forgotten what customer relationship management is actually all about?

Understanding CRM

Robert Ball, Director of the UK Software Developer Draycir, argues that successful CRM can only be achieved if an organisation fully understands their organisation's business strategy towards improving its customer relations – how it will improve internal communications within the organisation, how its customer needs will be better understood how can the business be proactive in meeting customer needs, and in turn, encourage retention through better relationships.

Working alongside channel partners in the UK, Europe and worldwide, Draycir have found that many businesses are still unsure about the benefits of investing in CRM software. Robert Ball of Draycir said: "Draycir Partners find that some organisations think CRM means having to buy complex or expensive software that does little more than store customer data such as email addresses and send out newsletters. Awareness of the value it can bring to the relationship with the customer is still not as widespread as it could be, especially in medium-sized businesses and organisations."

Streamlined Communication

CRM software is about putting all the information about an organisation's customer into one location and making it as easy as possible for every employee and department to access that information, save time in searching for the information they need and become more informed about their customers.

The immediate benefit of CRM integration is the time saved in searching for the relevant information about a customer. It means that staff can access data wherever they are and whenever they want, even if they are working from home or working internationally in a different time zone.

Effective CRM systems benefit the entire organisation, from sales, marketing and customer services to accounts, warehousing and logistics enabling all departments to gather the same customer intelligence to manage the customer relationship in a more streamlined, consistent manner.

Enhanced CRM

With the addition of an outbound document management system linked to the CRM system, such as Spindle Professional, copies of electronic documents can be automatically saved in the CRM system. Spindle Professional links the document to the relevant contacts and companies in their CRM system, with notes about the document and the date of when it was sent to the customer.

What's next for CRM?

As businesses move away from traditional communication networks, such as telecommunications and face-to-face meetings, there is even more opportunity for CRM technology to play a part in managing these relationships to keep up with the growing trend of connecting with customers via email, social media and online transactions.

As businesses move away from traditional communication networks, such as telecommunications and face-to-face meetings, there is even more opportunity for CRM technology to play a significant part in developing these relationships. The growing trend of connecting with customers via email, social media and online transactions means there is increasing importance for organisations to keep up.

Businesses that invest in CRM technology with clear business goals to improve their customer retention and increase revenue, have a great opportunity to connect with their customers more intelligently, at anytime and anywhere and gain competitive advantage.

About PCR

Established in 1992, PCR are a leading provider of Outsourced IT Support Services, integrated financial accounting software, Customer Relationship Management, Document Management and business applications to customers in Surrey, Sussex, Kent, London, and further afield.

As a Microsoft Silver Partner, we can customise Microsoft Dynamics CRM exactly to your requirements, either via a browser application, or embedded within Microsoft Office Outlook. CRM Online is popular with businesses of all sizes, providing quick access to the system, without the traditional IT overhead. There are no set up fees, no server infrastructure required, the system can grow with you and can be set up within 24 hours.

Contact us today to find out more. Visit www.pcr-ltd.co.uk or call 020 8681 0000.

PCR Computers Ltd
4 The Pavilions, 31-33 Brighton Road, South Croydon, Surrey CR2 6EB

Tel: +44 (0) 208 681 0000 | Fax: +44 (0) 208 681 0009
www.pcr-ltd.co.uk