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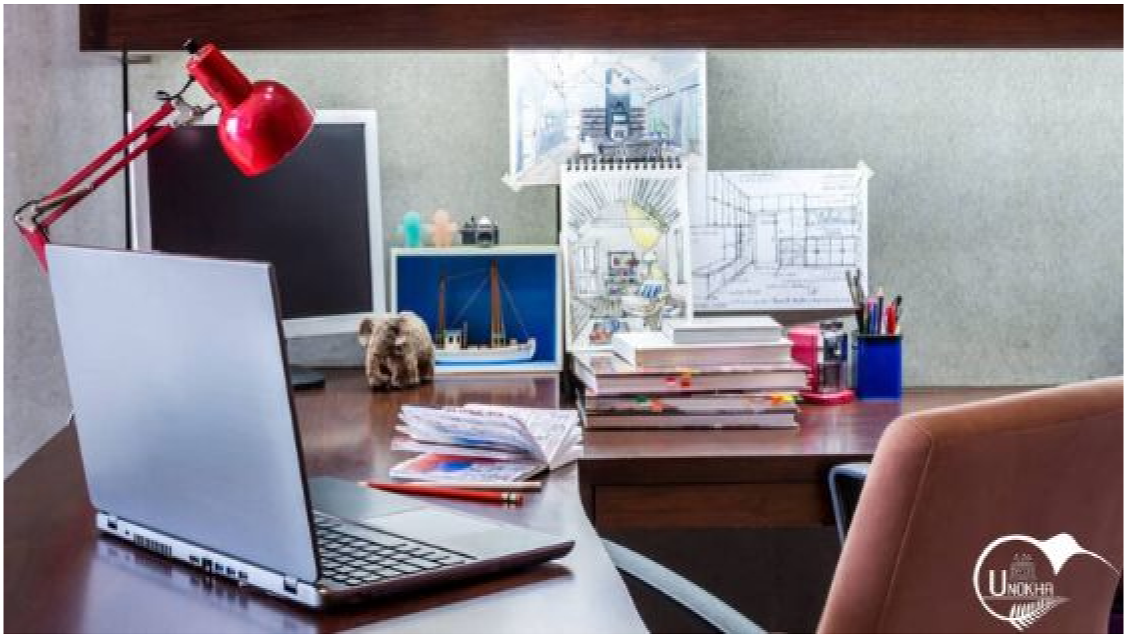

Navigate your CRM Through COVID-19

Connecting your CRM systems to your websites to reduce missed opportunities.

Most good CRM systems can be easily integrated with a site's web forms. Whether its through a web form, or via a web hook using glue code, its simple and can be done by someone with simple HTML knowledge.

That means that any information completed by an online visitor can be automatically, and immediately imported into the system and, combined with some workflows and automation, routed to the right person with reminders and alerts to follow up. The right person can be internal to your company or a prospect who fed the information.

At the very least, it ensures that data is getting into a database and not being lost in these disruptive weeks. With so many people working remotely during these times there's a much greater risk of things falling through the cracks when leads and inquiries come in from online.

But connecting your CRM system to your website and automating this process can significantly reduce the issue.

Creating workflows, alerts and reminders to bring together work from home employees.

Because of the COVID-19 pandemic many companies have sent their employees home to work. Its the safer and better way of working.

But sometimes things get lost or forgotten when there's no face to face contact or in-person meetings. I see stories galore on the forums I am a part of littered with a sprinkling of issues and problems they faced due to the work from home or remote working mode of work.

Thus there is a need to update the RIGHT Person when there is a need.

By configuring a CRM application's workflows and alerts, the right people will get reminded when a quote needs to be followed up, a service issue is outstanding too long or when an opportunity gets created.

Many of today's CRM systems with either AI-powered automation or simple workflow which can be customized, can recognize customer emails and automatically route problems or questions to the right person. The systems can also be programmed with additional steps to be taken if responses aren't timely.

If an employee falls ill, CRM workflows can immediately and automatically handle many tasks or at least delegate these assignments to someone else until they're better. And this can happen with minimal administrative knowledge - if the system has been nurtured and created using industry best practices.

And you can stop having to rely on your far-flung employees to generate pipeline, opportunity and service activity reports because all of these reports can be set to automatically run and be distributed if just a little time is spent configuring.

Using bulk email, campaigns and templates to stay in communication with their communities.

CRM systems can send out bulk emails, text messages and old-school mailers to groups of customers and others in a company's community.

By leveraging the system's templates functionality, all communications can be consistent and delivered with one corporate message.

Fully utilizing both campaigns and bulk-emails in a CRM system means companies can send out tailored, personalized mass messages to specific groups based on who they are, where they're located and what the relationship is with the company.

This is a critical activity which is a double edged sword. Sending bulk emails to the wrong set of people can be damaging. This gets us to the next aspect of cleaning our database and sorting lists.

They are using downtime to clean up data.

Most companies are implementing work from home policies to keep their employees safe. But let's face it: not everyone will be as busy as they are in the office.

Without the meetings and impromptu discussions and other activities that naturally take place in an office setting, it's likely that some people will have a little downtime. Identifying them and providing them a scope is essential. It's a perfect opportunity to do some data cleaning. Assign contacts and accounts to each of your employees and set objectives for getting their data cleaned, updated and revised by the time the COVID-19 situation is over and they return to the office.

A CRM system is just a database and its value is only as good as the data in it. So why not use this time to make this data as best as possible?

Integrating their calendar, email and office systems to increase productivity.

Many companies I work with have separate systems for their CRM, email and calendar. A few use Infusionsoft by Keap for keeping their contacts in one place and for marketing communication, while they also use Microsoft Office or Google for operational IT communication. They could use one - if they integrated all of these systems together. Its feasible and manageable.

In only a few instances do I see them truly integrating these platforms with their CRM system, which means they're doing a lot of extra work and potentially missing out on information they need.

Now that so many employees are being asked to work from home in the wake of the COVID-19 disease, the risk of missing out on important information – call data, notes, e-mail history, upcoming appointments and meetings – is increased.

To mitigate this problem the right thing to do is to bite the bullet and fully integrate a CRM system with all of these office systems. That way everyone's on the same page and no one is in the dark when they're talking to a prospect, customer or anyone else in a company's community.

We are in this for the long run and its necessary that we manage our CRMs for the business continuity plans to actually work. Clean data in a good CRM can do wonders for the business and its always a great time to Start the process.

Start Now. Stay Safe, Stay Healthy. Stay Home!