

Day to Day 30 Tasks Using CRM



#1

Unorganized Database



**Unorganized businesses don't
make a profit!**

The first and foremost way a CRM
will help your business is by
keeping all your data organized
on a single platform.

#2

Address Book Update



**Gone are the days of manual
update!**

A CRM will automatically store
and retrieve all your contacts
whenever you need them

#3

Event Scheduling



Who has the time to do it manually?

Got an event pending for long? Simply schedule it from within your CRM. Let your clients and employees know about it by triggering automatic follow-ups.

#4

Client Communication



Could it be more important?

One thing that is absolutely vital in this age of fierce competition is cultivating relationships with clients, and it has to be achieved through effective client communication.

#5

To-Do Task List



**Have a bad memory? Let a CRM
serve you!**

No more missing important tasks!
The inbox of your e-mail is not an
efficient place for you to keep
track of your tasks.

#6

Activity

Documentation



Documentation is boring; let's face it!

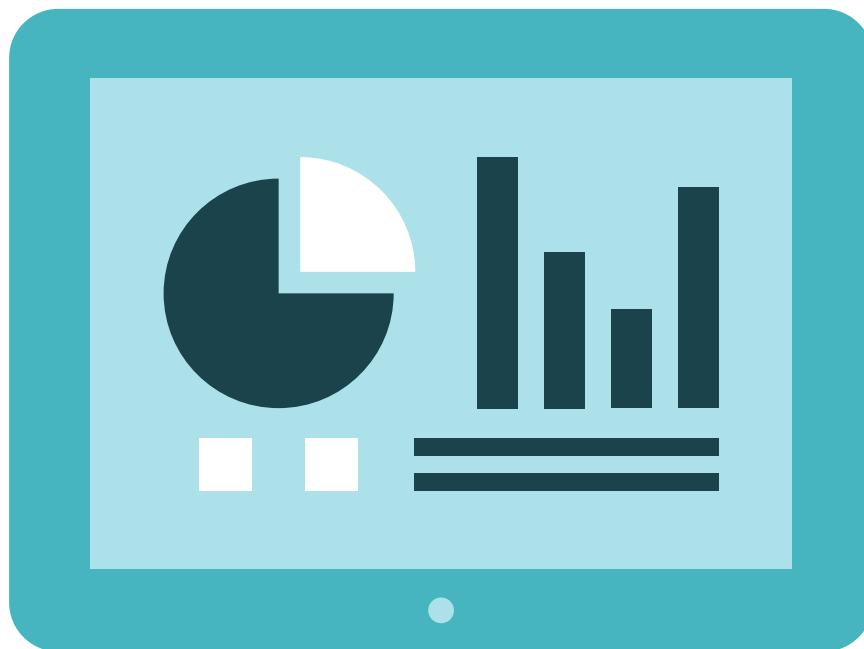
No one wants to undertake manual documentation anymore.

Not only it is lethargic and monotonous, but also highly counterproductive.

#7

Data

Management



Back that data up!

A CRM will back your data constantly on the cloud, so that you may access it anytime.

Previously, your business would have taken a great hit if your hard drives got corrupted

#8

Marketing and Sales

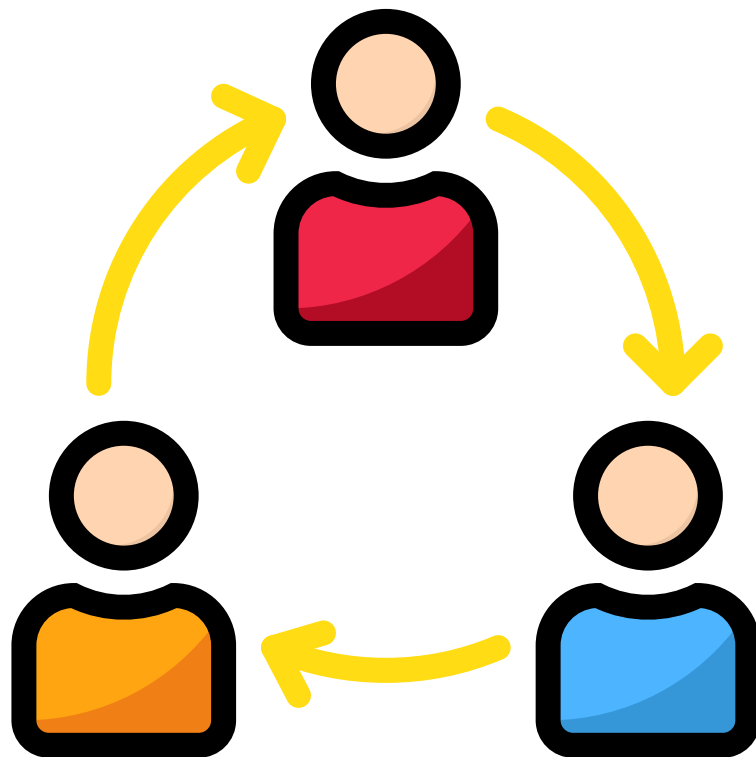


**A remedy for your digital
marketing muddles!**

Using a CRM, you can personalize
customer experiences by
providing a consistent message
across all marketing touch points

#9

Content Sharing



Know it all from your CRM!

Content Marketing is the only form of marketing that is left, says Seth Godin. Using a third-party platform to publish your content, you can keep track of what content helped and at what time.

#10

Email Marketing



**Why do it separately? Let's
integrate a CRM!**

Email Marketing still has the highest ROI as a marketing tool for B2B efforts. Actually, it returns around \$40 for each dollar spent as stated by Smallbiztrends

#11

Marketing and Sales



**Every disagreement resolved
before it occurs!**

No rivalry is as evident in the
business world than the one
between the Marketing and Sales
departments.

#12

Sales on the Go



Millennials are both buyers and sellers. Think you can escape Mobile?

With the advent of CRM, salespeople can deal with clients using their mobile phones and tablets.

#13

Forecasting Sales



CRM shows you a glimpse of the future!

Using the data gathered from all the marketing touch points, a CRM consolidates it and shows you the sales trends of the previous months & can also predict.

#14

Reporting

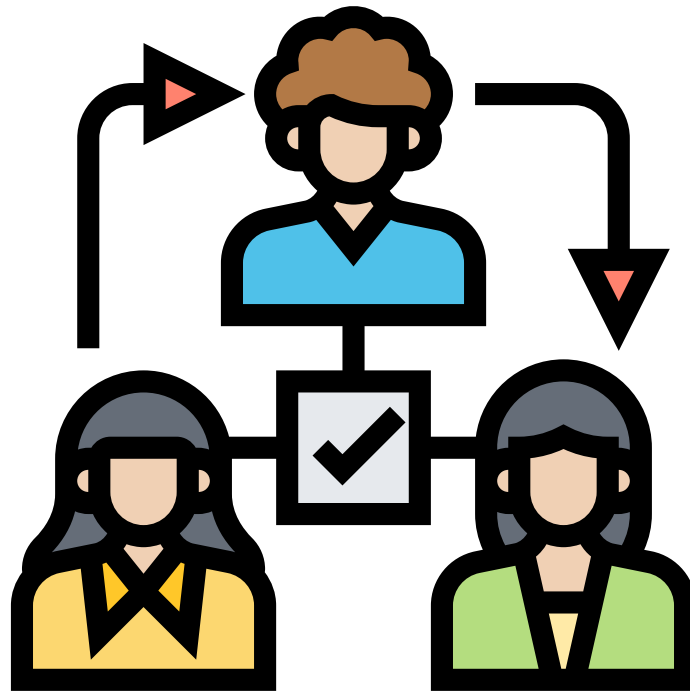


Good at your job? Reveal it!

Using a CRM, you can be sure that you get real-time reports from your data.

#15

Define Workflows



We all forget the steps at times.

Let's not do that anymore!

You can describe to your CRM the steps you usually take to carry out a certain task.

#16

Work from Home

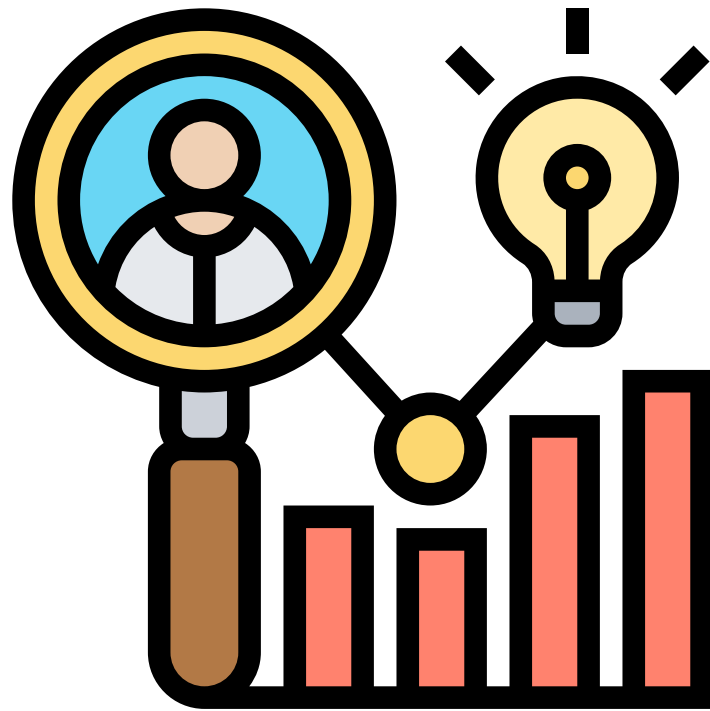


Work From Home

Cloud-based CRMs have made everybody's lives easier. When at home, you can easily check that last update on the deal you've been working so hard on.

#17

Social Insights



Social CRM is the next big thing!

The customers of every business are today present on social media.

Where companies have lost the power to start conversations about their brands, they can now participate in the ongoing tasks.

#18 Define Customer Journey

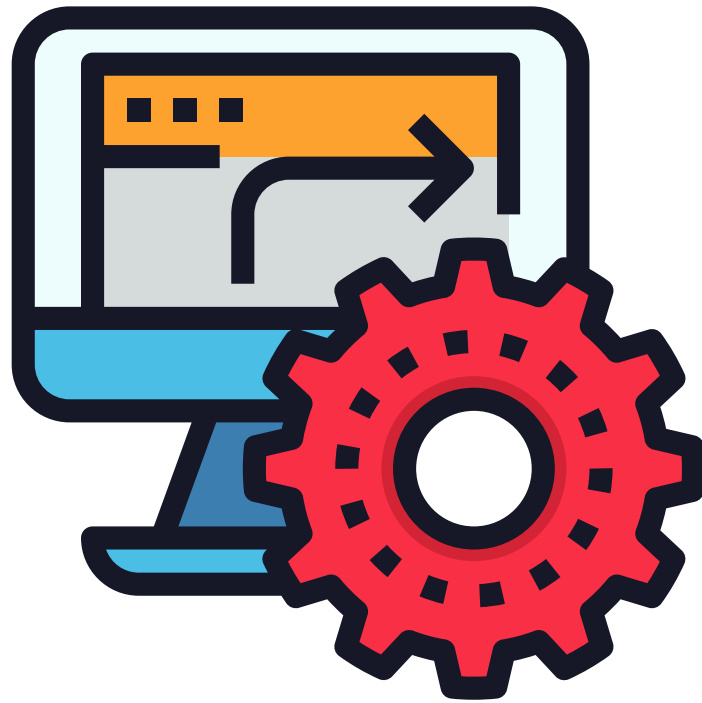


Know the exact steps you need to take to close the deal.

Every customer goes through several stages before buying a product/service.

#19

Marketing Automation



Automation.

There are several reasons to integrate Marketing Automation with your CRM. Marketing Automation platforms like Act-on, Hubspot, Marketo, etc.

#20

Lead Nurturing



Dead leads can come to life!

An intelligent CRM can spot upcoming leads that have the potential to become customers. Whether your leads come from email marketing, business cards or website.

#21

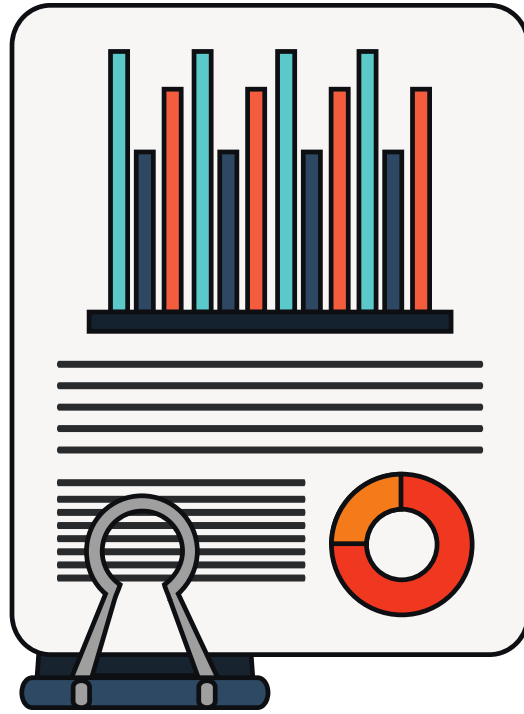
Customer Service



**Exceptional Customer Service helps
in up-selling!**

Customers today want to be responded to within a maximum of 2 hours after lodging a complaint. Responding to all requests manually becomes next to impossible.

#22 Insights from Your Data



**Big data is useless; you need
smart data!**

Following the millennium, the greatest challenge for companies has been to extract and gather vast customer data.

#23 Analyse Sales Pipeline



Visualize to get better!

It is very important to visualize your Sales Funnel in order to know how you can turn leads, opportunities or contacts into profitable sales.

#24 Analyse Business Sources



Analyse Business Sources

Tracking a few customers and their sources is easy but, on a larger scale, it gets very difficult to keep track of the sources from which you get the most business

#25 Defining Your Scope

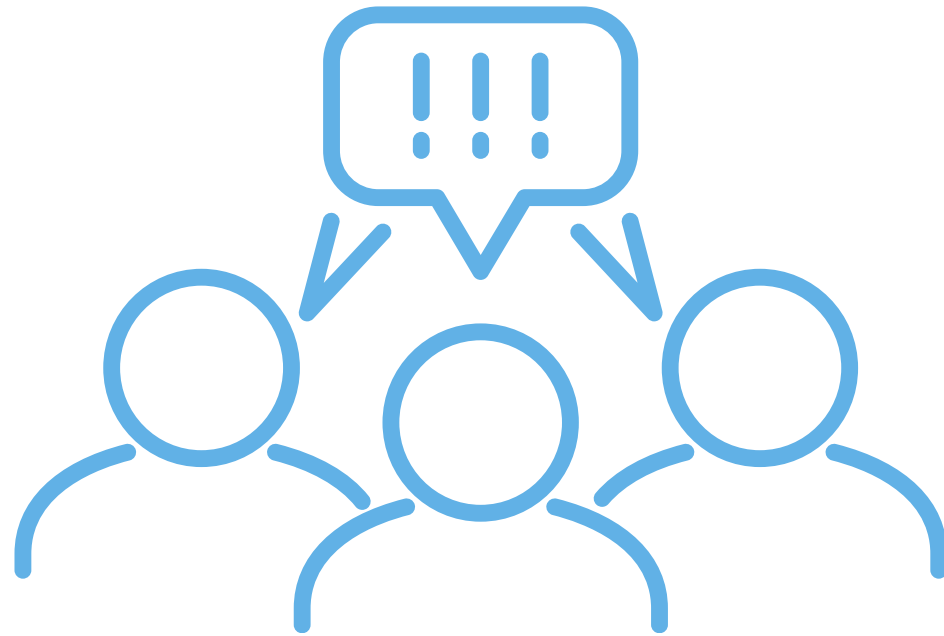


CRM helps you decide on future investment opportunities.

When you have a 360-degree view of your clients and how they contribute to your business, you can identify the market segments which are your cash-cows.

#26

Collaboration



Is your team on a unified platform?

The alignment between different departments at your business is essential for the overall augmented performance of your organization.

#27

Saves Time



Time is money. Why not save it?

The customers from every business field today are present on Social media. Where companies have lost the power to start conversations about their brands, they can now participate in the ongoing tasks.

#28

Workforce Efficiency



**Every lazy guy likes gadgets. CRM
is one!**

There are high performers and
then there are slackers in every
organization.

#29

Tracking

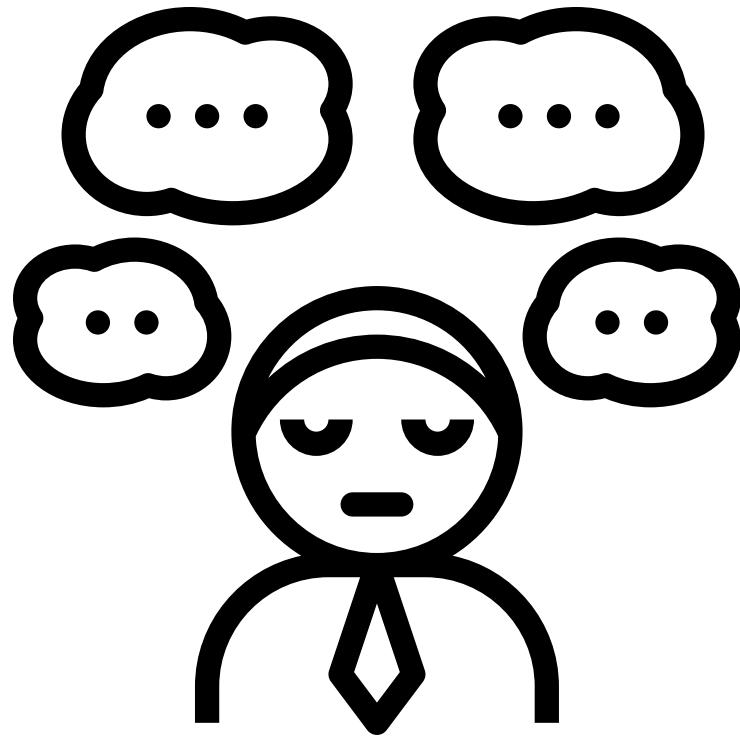


If the activity isn't in the CRM system, it never happened.

Every company needs to treat its CRM as the only repository for tasks carried out by its team.

#30

Let's You Worry Less

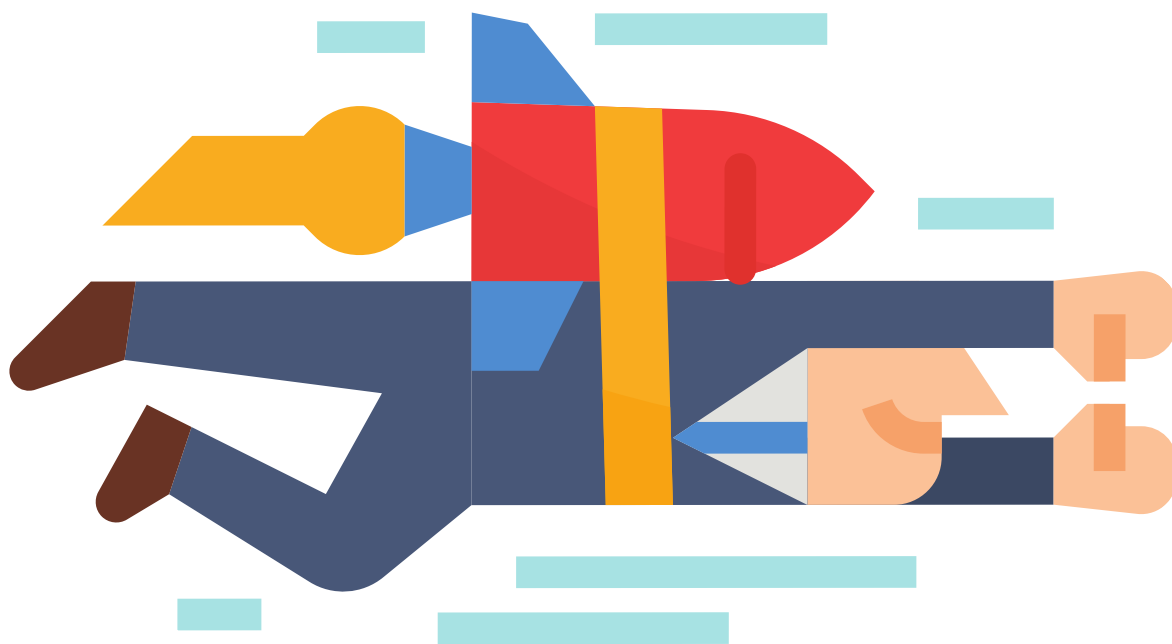


Nothing is forgotten; nothing gets left out!

At the very least, a CRM that is tailored to your exact needs and processes can let you worry less about your business and focus more on your business.



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