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Developing a CRM Strategy for Small Businesses

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Developing a CRM Strategy for Small Businesses

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I. Proposal Summary:

Honors Capstone Proposal: Developing a CRM Strategy for Small Businesses

Introduction: In a data-driven world, it is becoming easier than ever for businesses to gain more and more information about their customers and use that to their advantage. This data, gathered from previous business dealings, social media, inbound marketing and click data can be utilized to provide goods and services that are more accurately tailored to the specific consumer, and to provide successful customer service. However, there must be a customer relationship management (CRM) system in place to retain, sort, analyze and pull up information. This can be done using expensive software, which is what large and medium-sized corporations may do, but smaller businesses may struggle to find a system that works for them. This may mean a small business has multiple databases in which customer data is stored, and those are not integrated.

Research Proposal: We would like to research further into previous works about utilizing CRM, specifically in small businesses. We would then expand on these works by gathering data from a few local small businesses, using qualitative research, to determine what they currently use in terms of CRM tools, what issues they are experiencing with these tools, and how they think they could improve these. Then, we will put together this information to see if each business is experiencing similar problems (as in, whether all small businesses have the same challenges when it comes to CRM tools), and create a plan that can be used for small businesses to successfully integrate CRM into their business in order to create thriving relationships with customers.

II. Introduction: What is CRM?

Customer Relationship Management (CRM) relates to a business' ability to interact with customers. It deals with managing the data the company has that identifies the customers. It is critical for businesses to manage customer contact information and to have accurate information about the business happenings with each respective customer. The platforms for managing this information are called Customer Relationship Management (CRM) systems. Large businesses have high amounts of customer data and must understand the importance of CRM systems in order to succeed, but small businesses may overlook the necessity of CRM systems if they do not believe they have much data. It is just as important for small businesses to establish CRM systems, as customer data is critical in order to grow and remain efficient and streamlined (Microsoft). The main objectives of CRM are to create a central location for customer data, create easy flow between customers and marketing, help to make opportunities known, and analyze data to help the business make future decisions (Microsoft).

Customer Relationship Management is important in order for growth to occur in business, however it is also important when it comes to nurture campaigns for customers. For example, customer loyalty can be maintained "by storing key information to boost sales" (Angeles, 2017). When a customer joins a loyalty program and their information is stored in the company's CRM system, the customer can be tracked through every purchase or service provided. If the customer uses their loyalty card on their monthly grocery purchase, for example, the CRM system can be used to find out which items the customer most often purchases, and coupons can be sent for similar items to allow for growth in sales. Much of this can be done automatically, as "CRM software gives you and your sales team all the tools necessary to grow your business in a central hub with the least amount of work possible" (Angeles, 2017).

One of the most important aspects to emphasize is the ability for all employees to easily access the system and accurately view and update customer information, all while respecting privacy of the customers.

III. Three Types of CRM

Operational

Operational CRM are the “products and services that allow an organization to take care of their customers” (Straight Marketing). These can be considered to be the systems put in place in an organization related to customers, such as a software for tracking customer data. Some examples of this include contact centers, data aggregation systems, and websites (Straight Marketing). This type of CRM is focused on the processes that the customer interacts with, with emphasis on automation. The following automations are the focus of operational CRM: Marketing Automation, Sales-force Automation, and Service Automation (MGS Experts).

Marketing Automation is the automated process marketers can use to target customers based on specific information gathered by the CRM system (MGS Experts). Different campaigns can be run based on specific customer information. This is especially important for larger businesses, as the automation creates easy marketing to customers. Marketers do not have to pick through the information in order to have a successful campaign, the automated system easily sends out the campaign to individuals whose information matches the target audience.

Sales-automation deals with attracting new customers and obtaining information about prospective additions (MGS Experts). This can be broken down into leads (beginning of possible customer) and then prospects (actively working to gain them as a customer). An automated system simplifies the process.

Finally, Service Automation is concerned with the interaction of customers, and creates a customer history (MGS Experts). This information helps to show the needs of the customer based on the previous interactions the client had with the company (MGS Experts).

Collaborative

Collaborative CRM is “communication with customers and covers direct interaction with customers including feedback and issue reporting” (Straight Marketing). Outreach to customers, as well as inbound customer communication, is considered to be collaborative. Some examples of this include web pages, email, and Automatic Voice Response (Straight Marketing). The intention is to create better interactions with customers while retaining customers. This allows for customer interaction across the different channels, and allows customers to have a better understanding of the entire business process (MGS Experts). Customers are more likely to stay with the company if collaborative CRM is in place, and the respective business is also more likely to have an easier process for the customers. There are two major parts to collaborative CRM, interaction management and channel management (MGS Experts).

Interaction management deals with creating a system that is concentrated on the communication between the organization and the customer (MGS Experts). This goes as far as the client’s preference on how to be contacted, such as in person or over a certain technology. Examples of different ways customers may prefer to interact are in person meetings, web meetings (Skype or another video channel), phone conversations, and email exchanges. The organization needs to understand how the client operates in order to successfully do business and make the client comfortable and happy.

The next component is channel management, which deals with improving the channels that are used to interact with customers (MGS Experts). Companies need to keep the technology updated so that customers have an easy and quick process to connect with the organization. The latest technology will ensure efficiency and the accuracy of the collection of data (MGS Experts).

Analytical

Analytical CRM involves the “analysis of customer data for a host of different purposes” (Straight Marketing). This type of CRM is used to plan more effectively for marketing campaigns, and “design and execute targeted marketing campaigns that optimize marketing effectiveness” (Straight Marketing). The analysis is done throughout each part of the organization; there is customer analytics, marketing analytics, sales analytics, service analytics, and channel analytics (MGS Experts).

Customer Analytics involves analyzing customer information in order to have a better understanding of the customer and the customer behavior (MGS Experts). A business needs to understand its customers before it can successfully and consistently create products that fulfill the customer needs.

Marketing Analytics are crucial to finding new opportunities in the market (MGS Experts). The firm needs this to understand how they will create value for their customers in the future. It is also important because it helps determine marketing strategies and create a marketing plan throughout all levels of locations (MGS Experts).

Sales Analytics work to determine future sales in terms of volume and profit (MGS Experts). This helps ensure that all potential sales opportunities are taken, and helps create a more efficient sales process (MGS Experts).

Service Analytics are critical because they result in alterations to the services based on customer feedback (MGS Experts). The services are changed according to information from customer satisfaction, product cost, product quality, and complaints received (MGS Experts).

Finally, Channel Analytics looks at customer behavior across different channels. This is used to determine how the customers will be contacted (MGS Experts).

IV. Considerations When Choosing CRM Software

Price

Price is an important consideration when choosing CRM software, especially when it is a small business. Often times, the price of the software is the reason businesses do not have a CRM system, as they do not feel it is worth it to invest in the software. Prices for CRM software are usually a monthly fee, and often the price is dependent on a variety of factors, such as the number of users and features. To begin with, businesses may try free trials of different software, but this is not a long term solution. It is important to research the long-term costs and the long-term benefits of the software, and to not just look at the out-of-pocket costs (Diana). It is critical to choose a CRM software that will work with the infrastructure and not cause unnecessary costs when integrating with the infrastructure (Diana).

Specific Business Objectives

It is important to have clear goals before choosing a CRM software, as there are different capabilities according to each software and respective plan (Diana). There should be support from at least one higher level executive, as well as the major departments who will be utilizing the software (Diana). Once the objectives of both the business as a whole and each department is understood, the softwares can be analyzed and a specific plan can be chosen based on price and capabilities. The departments, primarily sales, marketing, and service, should write a list of their requirements from the software, and this list can then be used to measure the success of the software (Diana). It is important to have specific and measureable goals of the software in order to determine in the future how useful the product is for the business. This allows businesses to see the value of their CRM software (Diana).

Ability to Grow

The CRM system selected should be able to grow with the business, as a business should not be buying a new software every year (Diana). It is important to choose a software that is appropriate for the future growth of the company, or will at least last for quite a few years before needing to be replaced. This may mean the company will choose to start with a basic level plan, but they look at the more advanced plans as well and are aware that the advanced plans will be appropriate for the business as the company grows.

Reputation

Reputation is another consideration when choosing a CRM software (Diana). User reviews are great tools to look at when determining a CRM software, and there are many magazines and social medias that rate the CRM softwares (Diana). Consider speaking to currently customers of the product and inquiring about their satisfaction with the product (Diana).

Ease of Use

The software should also have a great deal of functions without being too overwhelming for the members of the business (Diana). Some CRM softwares are extremely elaborate and intricate, and it is important to understand the demands of each respective business (Diana).

Customization and Ability to Integrate

There are many different platforms the businesses can integrate their CRM systems with, such as Google services and Outlook. Businesses need to determine the level of integration and the amount of features needed for their company. Some softwares offer a great deal of customization, while others have very simple features.

V. Various CRM Systems Available

There are many CRM softwares available to purchase by businesses. A few of the most popular are detailed below.

Salesforce

Salesforce is the leading CRM software with about 14% of the CRM market (Blattberg 2014). The company invented cloud-based CRM, and it creates an easy connection between sales, marketing, and service management (Blattberg 2014). Salesforce has about 150,000 customers and 7,200,000 users (Hollar 2016). The software serves anywhere from very small to massive companies, as the use of the cloud allows for the management between sales, marketing and service (Blattberg 2014). The price of this software ranges from \$5-\$300 per month per user, all depending on the features chosen (Blattberg 2014). Salesforce is powerful, but small businesses may not need the amount of features offered.

Salesforce integrates with a social media network called “Chatter” and works with both iOS and Android devices (Blattberg 2014). A current weakness of Salesforce is mobile devices, but Salesforce is attempting to change that with “Salesforce1” (Blattberg 2014). Also, Capterra lists Salesforce as one of the Top 20 Most User-Friendly CRM Systems (Hollar 2016). While CRM has many features, they have so many that it can be difficult to learn the program. This then makes it difficult to deliver a powerful App that has the capabilities of the cloud-based service (Whitford, 2014).

Salesforce is a great CRM software, but it is not necessary for small businesses that just want simple uses for their CRM. It is better for medium sized to large sized companies that have complex CRM structures.

Insightly

Insightly is a cloud-based CRM software and is one of the cheapest options (Blattberg 2014). This software is meant for small businesses and startups, and it does not have the capabilities for larger companies. Insightly offers a free plan for up to three users, and then there are three paid plans users can choose. The starter plan is \$29 dollars per month, the advanced plan is \$49 dollars per month, and the pro plan is \$99 dollars per month (Blattberg 2014).

While there are more than 350,000 users, only tens of thousands actually pay for the software (Blattberg 2014). Insightly does have the ability to integrate with Google services, such as Google Apps, Gmail, and Google Drive (Blattberg 2014). It also integrates with Evernote, Office 365, Outlook, and MailChimp, and it has a mobile app for iOS and Android devices (Blattberg 2014). Insightly is a great solution for small businesses and startups, although the businesses will need to switch softwares as it grows.

Apptivo

Apptivo combines contact and lead management with project management and marketing software, and is relatively cheap (Hollar 2016). There are about 40,000 customers and 70,000 users on the software. Apptivo is the Editors' Choice for CRM software on PC Magazine (Kovac and Marvin 2016). Kovac and Marvin state that Apptivo is "one of the most flexible and affordable CRM tools on the market" (Kovac and Marvin 2016). The plans start at \$10 per month, with the Ultimate Plan being \$25 per month and \$20.83 per user (Kovac and Marvin 2016). Apptivo even supports mass email marketing and there is an App for mobile phones (Kovac and Marvin 2016). Apptivo is a great option for companies that want the flexibility and functionality of other softwares but do not want to pay the price of the softwares (Kovac and Marvin 2016).

HubSpot

Hubspot is a free CRM tool that integrates with the other marketing software offered by the company (HubSpot 2016). The CRM is cloud-based and easy to use; with email marketing tools, social media marketing tools, lead management, and many other features (HubSpot 2016). The software has about 60,000 customers and 120,000 users (Hollar 2016). It is not as developed as other softwares, but it is a great option for a CRM software.

Zoho

Zoho CRM is free for up to three users, and costs between \$12 and \$35 per user with three different plan options (standard, professional, and enterprise) (Blattberg 2014). It has integrations to social media, Google applications, Outlook and Quickbooks, and it offers API for custom integrations (Blattberg 2014). Zoho has about 80,000 customers and 20,000,000 users, and is one of the most popular CRM softwares (Hollar 2016).

There are clearly many softwares businesses can choose from, and companies need to decide on the appropriate software based on budgets and functionality. Small businesses need to invest in a CRM software that is cost effective but maximizes their ability to connect with the customers. CRM softwares are critical to the success and growth of businesses, and companies should do further research to determine the optimal CRM software.

VI. Why a Small Business Needs CRM

There are many reasons why a company may need CRM software, including the need for a robust contact management system, a desire for an automated way to boost sales, and the want to deliver better customer support (Angeles, 2017). First, the need for a contact management system is crucial to any business, and “for growing small businesses, traditional email, mobile, and other address books likely won’t be enough” (Angeles, 2017). In addition, these methods are not sustainable for the long term. Utilizing CRM software allows a company to have a database for “all types of insights on customers, including contact information, purchase histories, how customers browse your website, ways and times they’ve interacted with your company (and reasons why), demographics, interests, personal preferences, and more” (Angeles, 2017). Without a CRM system, it is nearly impossible to track data about customers to this detail.

Next, using a CRM system can be an automated way to boost sales, including tools that are involved in most CRM softwares including lead generation, prospect nurturing, email marketing, sales quotes and invoicing, order tracking, sales forecasting, performance tracking, and competitor tracking (Angeles, 2017). Lastly, CRM software can give you the ability to deliver better customer support. Customer relationship management is all about developing better relationships with customers, and that allows a company to see from the unique perspective of each customer. With the knowledge gained and tracked using a CRM system, better advice can be given to each customer. Information can be gathered and “having all this information in one place makes it easier for sales and customer service representatives to answer customer questions and resolve issues because they’ll have a readily available point of reference” (Angeles, 2017).

VII. Primary Research: How Small Businesses Utilize CRM

Questions Asked to Businesses

The following questions were posed to various local small businesses in order to determine what was normally used for customer relationship management systems. The answers to the questions and further analysis of the answers follows in later sections. Any email interviews were also sent out with a brief description of our project and Customer Relationship Management in general. Businesses could also choose not to answer any question for any reason, which some choose to do for privacy reasons.

1. What forms of customer relationship management do you use in your business?
 - a. Do you use a database?
 - b. What software do you use?
 - c. Do you have a loyalty program?
2. If you have a database, how do you use it to connect with your customers?
 - a. Do you see any more opportunities for uses of this database?
 - b. Do you see any problems with these database?
3. Do you have a loyalty program?
 - a. What sort of information about customers do you collect using your loyalty program?
 - b. What are the rewards?
 - c. Do you see any more opportunities for uses of the loyalty program?
 - d. Do you see any problems with the loyalty program?
4. Open: any other discussions about customer relationship management

No Utilization

Based on secondary research, it was expected that many small businesses would not utilize a CRM system and would not want to pay for the software required. In the North Andover area, many small businesses were contacted regarding their use of CRM. Many of these businesses do not currently implement a CRM system, as they fall among the many small businesses who do not see the value of a CRM system.

A local optical shop owner in the area stated that he/ she has chosen not to introduce CRM software, although they did consider it in the past. The business relies on referrals, prior clients, and walk-ins. This shop owner may find it useful to use CRM software in order to keep track of his clients and how his/her clients are connected. The owner could also utilize the software to market specific glasses, contacts, or other goods/ services. Targeted emails could be sent out specifically to clients that have contacts, or clients that have glasses. As the business continues to grow, the owner may change his/her mind and use CRM software in order to position themselves more competitively in the industry.

A small beauty shop in the North Andover area has also stated they are not using CRM software. They could also utilize CRM software in order to target their marketing, by tracking past purchases and then recommending similar products or products with the same scent or type. They could also offer discounts through emails, and advertise new products. They could even take it a step further and send out recommendations with quotes from current customers that have used the product in the past. That way, they are connecting with customers who already purchase the product and encouraging other clients to purchase them as well. There are an abundance of beauty product shops; it is important to differentiate and capitalize on their marketing opportunities.

Fred C. Church, Inc.

Allyson Bois, Communications and Recruiting Coordinator at Fred C. Church, Inc., was kind enough to answer a few questions about the company's CRM system. Unfortunately, due to privacy reasons, she was unable to be too specific about the CRM system that they used, or the loyalty system in place. Fred C. Church, Inc. is an insurance agency with several locations, although this study was only focused on the Andover location. They are a medium sized company, and they have been in business for 150 years so they are well established (Fred C. Church 2017). The slogan of Fred C. Church, Inc. is, "Because it's not just the policy, it's the people.®" The company's focus on their customers is important to note, because they should be investing the money to stand behind this promise.

Fred C. Church, Inc. utilizes a database that is built into their agency management system. In terms of customer relationship management, the company works on an individual basis to keep the information up-to-date. Each Account Manager/ Account Executive is expected to maintain a positive and active role with their clients, by sending out thank you notes and normal correspondence. The company tries to make the Account Managers highly accessible, and invites clients to call, text, or email their Account Manager when encountering any questions. The clients also receive contact before the renewal of their insurance policies.

The company sees some issues with the current database they use in terms of it not currently reaching its current potential of use. They are looking into having a better email campaign to have more frequent connection to customers. Currently, the company is using a system that does not allow them to have mass email campaigns, preventing the maximum connection to their customers. The company should look into other CRM systems, even if that means investing more money into their CRM software.

Merrimack College Bookstore

Brittney Hale, Marketing Manager at the Merrimack College Bookstore, also answered a few questions about her respective company's CRM system. The Merrimack College Bookstore is a campus store (although part of a larger company) providing books and apparel to students. The College is located in North Andover, and is relatively small.

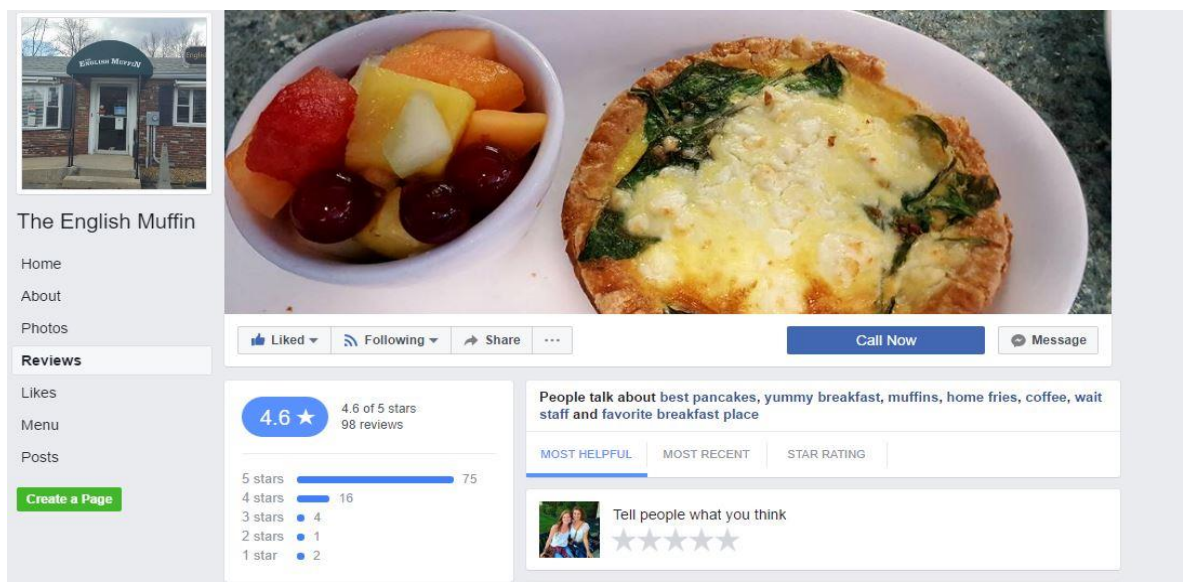
The customer information is kept track of by the POS system, they do not have any other CRM system. The POS system requires information with a book rental and/or purchase, which allows data to be collected on how many students purchase their books through the bookstore. It also keeps track on the customers that are renting, and helps the bookstore prevent late returns or forgotten rentals. When asked about how valuable the database is for the business, Ms. Hale stated that, "The database is very valuable as it allows us to track numbers and see how much money students save a year by renting their textbooks, which is now at over \$1 million since 2013" (Brittney Hale, 2017). This information helps the company predict future trends and market to future customers.

The Bookstore recently began a loyalty program in the form of an email program that customers can sign up for in order to receive a 20% off (one item) coupon on their birthday. The loyalty program requires the following information in order for customers to sign up: ID Number, Name, Phone, Email, address, and birth date. The Bookstore should expand the loyalty program and connect the POS system with the loyalty program. They should also offer more perks to members of the program, rather than just one discount a year. The more customer contact, the more people will come into the store. The Bookstore should also utilize campus events in order to get more people to come in and receive a perk. Ms. Hale acknowledged the need to expand the loyalty program in her interview.

The English Muffin

The English Muffin is a small breakfast and lunch diner located in the southern New Hampshire area. Overall, the sales at this restaurant are estimated to be about \$400,000 annually. The restaurant has been in business for approximately fifty years, but new ownership has taken over for the past six years. As soon as the new owner took over management of the restaurant, various technologies were changed, including customer relationship management methods. As of 2011, the restaurant has used Aloha systems as their computer system, rather than pen-and-paper for orders and classic cash registers. The restaurant also implemented a loyalty program, and social media (Facebook) use.

The loyalty program and Facebook are the main customer relationship management programs used at the English Muffin. Facebook is used to connect with customers, as customers click “like” and then follow the restaurant for various updates, which often include menu updates or changes to restaurant hours. As of April 2017, the page had 912 “Likes”, and 1,931 people had “Checked In” to the restaurant. Examples from the English Muffin Facebook page shown below:



The screenshot displays the Facebook page for 'The English Muffin'. On the left is a navigation menu with options: Home, About, Photos, Reviews, Likes, Menu, Posts, and a 'Create a Page' button. The main content area features a photo of a breakfast dish consisting of a bowl of fruit (strawberries, pineapple, mango, and cherries) and a quiche with spinach and cheese. Below the photo are interaction buttons: 'Liked', 'Following', 'Share', and 'Call Now'. A review section shows a 4.6 star rating based on 98 reviews, with a breakdown: 75 five-star reviews, 16 four-star reviews, 4 three-star reviews, 1 two-star review, and 2 one-star reviews. A testimonial from a customer reads: 'People talk about best pancakes, yummy breakfast, muffins, home fries, coffee, wait staff and favorite breakfast place'. Below the testimonial are tabs for 'MOST HELPFUL', 'MOST RECENT', and 'STAR RATING', and a prompt to 'Tell people what you think' with a five-star rating.



The English Muffin loyalty program is another customer relationship management tool that could be utilized more effectively. Currently, the program is used to increase customer expenditure and bring customers in for more purchases. This is achieved by scanning a card into the Aloha loyalty system, giving the customer a “point” for every dollar spent, and giving the customer \$10 back to use on future purchases once 100 points are reached. This can be reloaded and the card never expires. Almost every customer is offered the card, and approximately 50-75% of the English Muffin customer base has a loyalty card. Although the program is very effective at bringing customers back, by essentially giving them 10% on every purchase, not every loyalty program customer is tracked. The customer is given the option to register the card online, therefore attaching a name, phone number, and email to the card, but not every customer does so. This makes the program easier to use for the customer, however, opportunities are being lost.

VIII. Conclusions

Having an effective customer management system in place is imperative for every business, including small and medium-sized businesses that may not be able to afford the costly systems that large companies utilize. However, it is apparent that various companies do not have a customer management system, and are not taking advantage of the simple, and sometimes inexpensive methods. Examples of these include the beauty parlor and optical shop located in Massachusetts, that do not track past purchases and instead focus on gaining clients by walk-ins and referrals. Even those businesses that do have a customer relationship management system in place, such as The English Muffin, Fred C. Church, and the Merrimack College Bookstore, could be improving their systems or using them in a more effective manner.

There are various types of customer relationship management, and three levels, which include operational, collaborative, and analytical. Operational is the simplest level, including data collection, collaborative is next and involves communication with the customer, and analytical is the execution of targeted marketing campaigns based on the customer relationship. When choosing a CRM software, there are many considerations involved, including price, specific business objectives, on-demand/on-site, ability to grow, reputation, ease of use, customization, and ability to integrate. The various factors may be more or less important to each business, but each are important to consider. Currently, there are many CRM systems available for purchase, including Salesforce, Insightly, Hubspot, Apptivo, and Zoho. Salesforce is the leader in the industry and is cloud-based. Every company should have some method of CRM, and may need a software, so that they have a contact management system that works, a method of boosting sales automatically, and an easy way to deliver specialized customer support.

The English Muffin, Fred C. Church, and The Merrimack College Bookstore were interviewed to determine what sort of customer relationship management system goes into making their businesses run. The English Muffin focuses primarily on social media and a loyalty card system. There are recommendations for the three businesses to better their customer relationship management systems in the following section.

IX. Recommendations

The English Muffin loyalty program is a great example of a customer relationship management program that could be used more effectively. If each loyalty card was registered, then the purchases and preferences tracked to that card would be attached to a name and contact information. It is therefore recommended that The English Muffin begin to utilize the registered card information, and begin to entice more customers to register their cards. For example, the restaurant can use their database to determine who has not used their loyalty card in the last month, and send a coupon to those customers using the email that was given. In addition, the restaurant could send out email blasts to the entire customer database with new and exciting menu options, deals, or coupons.

Fred C. Church, Inc. should invest in stronger CRM software that will allow them to have stronger email campaigns and better manage their customers. The company should invest more money and time into their CRM system, and they should also grow their marketing department and give them a stronger role with connecting with customers. A more centralized system may prevent confusion, any potential customers slipping through cracks, and anything that does not align with their branding.

The Merrimack College Bookstore should look into investing in a CRM software that they can connect to their current POS system. The company will then be able to reach more customers and have a more personal connection to their consumers. The Bookstore should expand the loyalty program and connect the POS system with the loyalty program. More perks should be offered to entice people to join the loyalty program. The more customer contact, the more people will come into the store. The Bookstore should also utilize campus events in order to get more people to come in and receive a perk.

X. Further Questions to be Answered

Many customer relationship management systems were studied and analyzed, however, the method of utilizing social media to maintain customer communication and keep track of customers was not. Facebook was mentioned in the customer relationship management system in the restaurant studied, and it may be important to consider when determining what customer relationship management system would be best to use. There are further questions below:

- How can Facebook be utilized as a customer relationship management system?
- Can customer “likes”, “check-ins” and “reviews” be an accurate measure of customer satisfaction for businesses to study?
- Can customer data be tracked, other than the customer’s name on their profile?
- Is Facebook more effective than other, more costly CRM systems?
- Are there any other forms of social media that could be utilized as a CRM system?
- Lastly, if the recommendations were implemented in the businesses studied, how much better would their businesses perform over time?

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